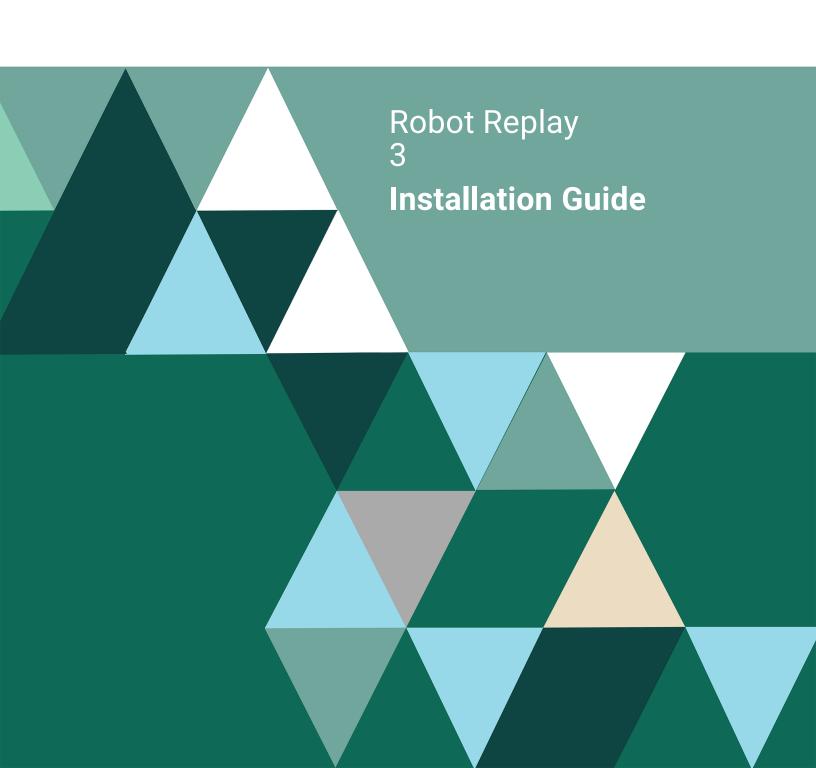
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Before You Begin

Read these instructions completely before attempting an installation or update.

- This document provides specific instructions on how to install or update Robot Replay using the Product Loader.
- For Robot Replay to operate, you must first install Robot Schedule, version 10.20 or higher.
- You must apply specified PTFs to your operating system before you can run Robot Replay.
- The Robot Replay installation creates or changes two user profiles: RBTUSER and RBTADMIN. These profiles own all Replay objects. RBTADMIN has the characteristics of a QSECOFR profile. RBTUSER has attributes like QPGMR. Directory entries are added automatically for the RBTADMIN and RBTUSER profiles. These profiles were created for the following reasons:
 - They satisfy requests from corporate auditors that our objects be owned differently from IBM objects.
 - They allow us to build a secure product for your environment.
 - They isolate Fortra products from IBM changes to the QPGMR or QSECOFR profile defaults.

Note: If you have made any manual changes to the RBTUSER or RBTADMIN user profiles and their authorities, these changes will be lost with any product installation or conversion.

 Before loading Robot Replay, we check if RBTSYSLIB needs to be updated. If it does, you'll be asked to bring down the subsystem RBTSLEEPER. This ends all Robot products running on your system. When the update completes, the subsystem will restart automatically.

- For installs only: When you're finished loading Robot Replay, follow the steps below to enter the license code.
- Once the installation or update process completes, read the <u>After You Are Done</u> section for additional information.

Installing or Updating Robot Replay

Use these instructions to install or update Robot Replay. This process downloads everything to your PC and loads the objects on the IBM i. Read the following steps carefully to proceed.

- 1. Download the Robot Replay installer (setupReplay.exe). Double-click it to start it.
- 2. On the Choose Components panel, select which components you want to install.
- 3. On the IBM i Details panel:
 - a. Select or enter the IBM i where you want to load Robot Replay.
 - b. Enter a user profile and password that's a member of the user class *SECOFR and has at least the following special authorities: *ALLOBJ, *SECADM, *JOBCTL, and *IOSYSCFG. The user profile should have Limit capabilities set to *NO. This profile will be used to restore and copy objects, and for product maintenance on the IBM i.
 - c. (Optional) In the Advanced Settings section:

- Enter a port number or use the arrows if you want to change the FTP port number to something other than the default of 21.
- Select Secure File Transfer if you want to use FTPS (FTP over SSL)
 during the file transfer. The default FTPS secure port is 990, but it can be
 changed to the required secure port for your environment.
- In the **Timeout (seconds)** field, enter the number of seconds the session should be kept active during an FTP transfer. You can choose anywhere between 25 and 1800 seconds (30 minutes).

Note: If the transfer takes longer than the amount of time specified, the session will expire.

- d. Click Next.
- 4. You have two options on the Product Load Options panel:
 - a. Click **Immediate Load** if you'd like to load the product on the IBM i now.

Note: If you are doing an update, this ends Robot Replay until the product load completes. After you are done, we'll restart the product.

b. Click **Staged Load** if you'd like to transfer the objects now and load them on the IBM i at a later time.

Note: See "Loading Staged Objects on the IBM i" below for instructions on how to load the staged objects on your selected IBM i system.

- 5. The Product Load Progress panel for Robot Replay launches. When the processing is complete, you have two choices:
 - If this is the only installation or update of Robot Replay that you are doing, click
 Finish.
 - If you have installations or updates to do on other IBM i systems, click Restart.
 Then, return to step 2.

Note: If the Product Load Progress panel ends with an overall Failed message, the product upload could not complete properly. To find the reason the upload failed,

click **View Logs** and review your logs. You can also use **Download** at the top of the logs to save the information for future review.

Follow the steps in the next section to install on the IBM i you identified above.

Loading Staged Objects on the IBM i

If you chose to stage your objects during step 4b of the installation or update process, do the following to manually load them on the IBM i you identified above.

- On the IBM i, execute the following command to display the Work with Loads panel:
 HSLOADMGR/HSWRKLOAD
- 2. Enter option 1, Load, next to the Load Name for Robot Replay and press Enter.

Entering the License Code

Note: You only need to enter a license code after installing Robot Replay. If you updated Robot Replay, skip these steps.

After you load Robot Replay, you must enter a license code in order to use the product. If you have not received a license code, contact your Regional Sales Manager.

 Execute the following command on the IBM i to open the Installed Robot Products panel:

RSLVER

2. Enter option **1** by Robot Replay to open the Robot Replay License Setup panel.

- 3. Copy your new license code. Then, paste it into the first entry field under **License**Code (it will automatically fill the other fields).
- 4. Press Enter.

After You Are Done

- To access the product's Main Menu on the IBM i, execute the command RBO on a command line to display the Robot Automated Operations Solution panel. Then, enter option 11 for Robot Replay.
- Set up Robot Replay on your system as described in the Robot Replay User Guide.
- Three libraries were restored to your system for use during the installation or update process: HSLOADMGR, HSLOADMGRW, and RBTCDRLIB. We do not remove them from your system in case you are doing multiple installations. You can delete them when you are finished.

Note: You can move the library HSLOADMGR to a different system on the IBM i and use it to complete additional installs or updates.

Before You Begin

Read these instructions completely before you begin.

- This document provides specific instructions on how to convert Robot Replay using the Product Loader.
- To run Robot Replay 3, you need the following release/modification level (or higher)
 of Robot Schedule: R10M20.
- You must apply specified PTFs to your operating system before you can run Robot Replay.
- In Robot Replay 2, you could create Robot Replay applications and optionally assign your Replay objects to these applications in order to group them logically. In Robot Replay 3, each Replay object must be assigned to a Replay application. When you convert from Robot Replay 2 to Robot Replay 3, the conversion process checks for Replay objects that are not assigned to an application. Any unassigned objects are automatically assigned to the *BLANK application.
- The Robot Replay conversion process creates or changes two user profiles:
 RBTUSER and RBTADMIN. These profiles were created for the following reasons:
 - They satisfy requests from corporate auditors that our objects be owned differently from IBM objects.
 - They allow us to build a secure product for your environment.
 - They isolate Robot products from IBM changes to the QPGMR or QSECOFR profile defaults.

Note: If you've made any manual changes to the RBTUSER or RBTADMIN user profiles or their authorities, these changes will be lost with any product installation or conversion.

- Before loading Robot Replay, we check if RBTSYSLIB needs to be updated. If it does, you'll be asked to bring down the subsystem RBTSLEEPER. This ends all Robot products running on your system. When the update completes, the subsystem will restart automatically.
- When you're finished, read the After You Are Done section for additional information.

Converting Robot Replay

The Robot Replay conversion process downloads everything to your PC and transfers the objects to the IBM i. This process is described in the following section.

- 1. Download the Robot Replay installer (setupReplay.exe). Double-click it to start it.
- On the Choose Components panel, select which components you want to load. Click Next.
- 3. On the Choose a Destination IBM i panel:
 - a. Select or enter the IBM i where you want to load Robot Replay.
 - b. Enter a user profile and password that's a member of the user class *SECOFR and has at least the following special authorities: *ALLOBJ, *SECADM, *JOBCTL, and *IOSYSCFG. The user profile should have Limit capabilities set to *NO. This profile will be used to restore and copy objects, and for product maintenance on the IBM i.
 - c. (Optional) In the Advanced Settings section:

- Enter a port number or use the arrows if you want to change the FTP port number to something other than the default of 21.
- Select Secure File Transfer if you want to use FTPS (FTP over SSL)
 during the file transfer. The default FTPS secure port is 990, but it can be
 changed to the required secure port for your environment.
- In the **Timeout (seconds)** field, enter the number of seconds the session should be kept active during an FTP transfer. You can choose anywhere between 25 and 1800 seconds (30 minutes).

Note: If the transfer takes longer than the amount of time specified, the session will expire.

- d. Click Next.
- 4. You have two options on the Product Load Options panel:
 - a. Click **Immediate Load** if you'd like to load the product on the IBM i now.

Note: This ends Robot Replay until the product load completes. After you are done, we'll restart the product.

b. Click **Staged Load** if you'd like to transfer the objects now and load them on the IBM i at a later time.

Note: See "Loading Staged Objects on the IBM i" below for instructions on how to load the staged objects on your selected IBM i system.

- 5. The Product Load Progress panel for Robot Replay launches. When the processing is complete, you have two choices:
 - If this is the only conversion of Robot Replay that you're doing, click Finish.
 - If you have conversions to do on other IBM i systems, click **Restart**. Then, return to step 2.

Note: If the Product Load Progress panel ends with an overall Failed message, the product upload could not complete properly. To find the reason the upload failed, click **View Logs** and review your logs. You can also use **Download** at the top of the logs to save the information for future review.

Loading Staged Objects on the IBM i

If you chose to stage your objects during step 4b of the conversion process, do the following to manually load them on the IBM i you identified above.

 Execute the following command to make sure no users are signed on to the product you're converting:

WRKOBJLCK OBJ(RBTRPYLIB) OBJTYPE(*LIB)

2. Execute the following command to display the Work with Loads panel:

HSLOADMGR/HSWRKLOAD

3. Enter option 1, Load, next to the Load Name for Robot Replay and press Enter.

After You Are Done

- After the conversion completes, execute the WRKSPLF command to check the spooled files for any errors that may have occurred. If you have any questions, contact Technical Support.
- Three libraries were restored to your system for use during the conversion process:
 HSLOADMGR, HSLOADMGRW, and RBTCDRLIB. We don't remove them from your
 system in case you're doing multiple conversions. You can delete them when you're
 finished.

Note: You can move the library HSLOADMGR to a different system on the IBM i and use it to complete additional conversions.

Security Modes and Role-Based Security

When you convert to version 3, Robot Replay security works the same way that it did in version 2 (in Robot Replay 2, the user profile that worked with a Replay object had to have *USE authority to the user profile under which the object ran) until you turn on Robot Replay's new role-based security.

In Robot Replay 3, there are three possible security modes: *LEGACY, *ACTIVE, and *INACTIVE (the current security mode displays on certain Robot Replay panels). The *LEGACY mode is the initial security mode only when you first convert from Robot Replay 2 to 3. In this mode, Robot Replay security works the same way as it did in version 2. After conversion, this security mode remains in effect until you turn on role-based security.

When you turn on role-based security, the security mode changes to *ACTIVE. At this point, you can turn it off (the security mode becomes *INACTIVE) and on as many times as necessary, but you cannot return to *LEGACY mode.