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OpenText™ Output Transformation Server Manager

Administration Guide

This document provides information intended for use by administrators about the features and functionality of Output Transformation Server Manager.

VDTOTS240200-AAC-EN-1

OpenText™ Output Transformation Server Manager
Administration Guide
VDTOTS240200-AAC-EN-1
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This documentation has been created for OpenText™ Output Transformation Server Manager CE 24.2.
It is also valid for subsequent software releases unless OpenText has made newer documentation available with the product, on an OpenText website, or by any other means.

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Chapter 1

Introduction

This guide provides detailed information about Output Transformation Server Manager for administrators, with respect to its purpose, use, and functionality.

1.1 Purpose

Output Transformation Server Manager is a thin client consisting of a number of JSP pages that enable users to connect directly to Output Transformation Server installed onto any of the supported Java Enterprise Edition (Java EE) application servers.

1.2 Functionality

The Output Transformation Server Manager enables a user to do the following:

- Start and stop the installed server.
- Flush the server. Output Transformation Server Manager will stop the server and decline any newly submitted jobs after the current job has completed.
- Monitor the current server status.
- Monitor jobs that are currently running.
- Stop individual or all current running jobs.
- Modify, run, view, export, and delete projects.
- View all or search on performance metrics for any or all installed projects.
- View and load license files.
- Activate and deactivate logging profiles.
- View and delete individual log files.
- Track and collect transaction usage data.

1.3 Starting Output Transformation Server Manager

After successfully completing the Package and Deploy Wizard in Output Transformation Server to set up the Output Transformation Server Manager, you can access the console in the following way:

- In your web browser, enter the host and port number of the application server to which the Output Transformation Server EAR was deployed along with the context root. The address that you must type in is `http://<host>:<port>/OTSManager/`, replacing the host and port information with the ones for your server.

  Note: The Java EE server must be started prior to starting Output Transformation Server Manager.

The Output Transformation Server Manager log in screen appears.

1.4 Server Login

Upon launching Output Transformation Server Manager in your web browser, the **Account Login** screen appears:

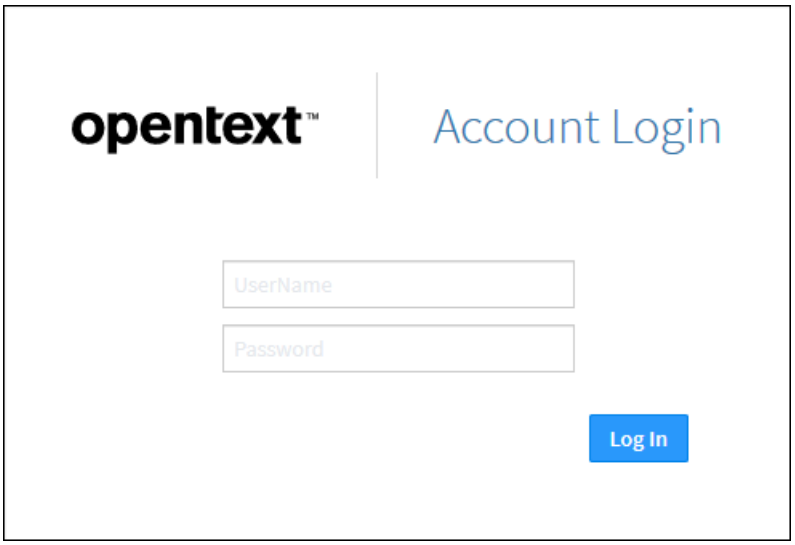

Figure 1-1: Output Transformation Server Manager Login screen

The login credentials are defined during the Package and Deploy Wizard, on the **Set Up User Admin Account** screen.

If you have successfully signed in before, your user name is automatically stored. The next time you access the Account Login screen, the last user ID used appears in the User Name field.

1.4.1 Default User

A default user named **Administrator** is created during installation, unless you are using a WebSphere Liberty or Oracle server where the admin name is reserved by the system. However, you can modify the admin name on WebSphere Liberty and Oracle with a customized name. (For more information about editing user names, see the respective deployment guides for WebSphere Liberty and Oracle.)

1.4.2 Password

The password to access Output Transformation Server Manager is defined during the Package and Deploy Wizard, which is accessed from the Output Transformation Designer **Welcome** tab. When entering the password, be aware that passwords are case sensitive.

Chapter 2

Users, Roles, and Permissions

Permissions allow you to manage user groups based on their roles in the system. With permissions, you can expose only the relevant features to specific user groups and restrict them from accessing more critical aspects of the console.

2.1 User Group Roles

There are six predefined user group roles: Administrator, Billing Administrator, User Administrator, System Administrator, Developer, and Job Runner. The following table describes the roles each user group has in managing your environment.

Table 2-1: Role types and descriptions

Role	Role Group Name	Description
Administrator	Administrators	Holds permissions to fully access all management features.
Billing Administrator	BillingAdmins	Holds permissions to access system statistics like usage reports and job auditing.
User Administrator	UserAdmins	Holds permissions to access user management functions.
System Administrator	SystemAdmins	Holds permissions to access system maintenance features.
Developer	Developers	Holds permissions to access project resources and deployments.
Job Runner	JobRunners	Holds permissions to access job execution APIs, but does not have access to Output Transformation Server Manager.

When assigning a user to a group, assign the most suitable role to each user to provide them with the most appropriate level of access and not more than they require. Each role type has permission to perform the tasks shown in the following table.

Table 2-2: Roles and access permissions

	Administrator	Billing Administrator	User Administrator	System Administrator	Developer	Job Runner
View Stats	Yes	Yes	Yes	Yes	Yes	
Reset Stats	Yes			Yes		
View Logs	Yes	Yes		Yes	Yes	
Start/Stop Logs	Yes			Yes		
Delete Logs	Yes					
Write Logs	Yes			Yes		
View Usage Reports	Yes	Yes				
View Job Stats	Yes	Yes				
Read Authentication	Yes					
Write Authentication	Yes					
Delete Authentication	Yes					
Restart Engine	Yes					
View License	Yes	Yes		Yes	Yes	
Deploy License	Yes					
Read User Sessions	Yes		Yes	Yes		
Delete User Sessions	Yes		Yes	Yes		
Read User Locks	Yes		Yes	Yes		
Delete User Locks	Yes		Yes	Yes		
Execute Jobs	Yes			Yes	Yes	Yes

	Administrator	Billing Administrator	User Administrator	System Administrator	Developer	Job Runner
View Jobs	Yes					Yes
Delete Jobs	Yes					Yes
Read Services	Yes			Yes	Yes	
Start/Stop Services	Yes			Yes	Yes	
Write Services	Yes			Yes		
Read Resources	Yes				Yes	
Write Resources	Yes				Yes	
Delete Resources	Yes				Yes	
Read Component Pool	Yes				Yes	
Write Component Pool	Yes				Yes	
Delete Component Pool	Yes				Yes	
View Schedules	Yes			Yes		
Write Schedules	Yes			Yes		
Delete Schedules	Yes			Yes		
Read Configuration Manager Solutions	Yes				Yes	
Write Configuration Manager Solutions	Yes				Yes	

	Administrator	Billing Administrator	User Administrator	System Administrator	Developer	Job Runner
Delete Configuration Manager Solutions	Yes				Yes	
Read Cluster	Yes					
Writer Cluster	Yes					

2.2 Assigning Users to Groups

The primary function of groups is outlining a set of privileges within the console that is shared among the users within the group. Each predefined role group is granted different levels of access to the console. You can assign users to groups in the default File-type user authentication scheme, which is stored under your base repository directory in the `\_resources\authentication\user.xAuthScheme` file.

There are six predefined role group names that users can be assigned to:

- Administrators
- BillingAdmins
- UserAdmins
- SystemAdmins
- Developers
- JobRunners

When assigning a user to a group, assign the most suitable role to each user to provide them with the most appropriate level of access and not more than they require. For more information on the permissions each role type has, see "User Group Roles" on page 9.

To assign a user to a group:

1. In Output Transformation Designer, open the `user.xAuthScheme` file for editing.

   The Authentication Scheme tab opens in the Development window.

2. In the right pane, review the predefined role groups, as outlined by the **Roles** element, and determine the most suitable role you want to assign to the user. Note the actual group names to use for the role you want to apply are stored as the values under each Role.

3. Expand the **SchemeType** > **User** element and locate the properties for the user account you want to assign to a group.

4. Within the user properties section, check for existing **MemberOf** elements, if applicable, to see which role groups the user is currently assigned to. The value for MemberOf must match one of the predefined role group names. For example, `UserAdmins` indicates that the user is part of the user administrators group.

   To add a new MemberOf value, you can right-click on the element and from the context menu that appears, select **Add**.

   

   Note: A user can be assigned to multiple groups, however, note that the higher level of access according to the permission levels for the specified groups takes precedence. For instance, if a user is made a member of both Administrators and Billing Administrators, the level of access available to Administrators overrides the permissions for Billing Administrators.

5. Save your changes.

   The changes take effect immediately.

Chapter 3

Using the Output Transformation Server Manager Interface

The Output Transformation Server Manager interface consists of a collection of tabs that you can switch between with specific tasks that can be run under each tab. The tabs and their available tasks are:

- **Info tab**
  - **Status**. Provides information on your application server.
  - **Logs**. Details the logging profiles and related information.
  - **License**. Supplies information about your current license along with the ability to deploy a new license.
  - **Cluster**. Displays a graphical representation of the nodes in your cluster and some information about each node,
- **Resources tab**.
  - **File System**. Displays your mounted file system and allows some basic editing of resources to be performed
  - **Services**. Provides a list of all services currently loaded by Output Transformation Server as well as the present status of each.
  - **Component Pool**. Provides a list of all components currently loaded by Output Transformation Server in addition to some configuration details.
  - **Schedule**. Displays a list of all jobs and services scheduled for execution by the system.
- **Analysis tab**
  - **Query By Date**. Allows you to run a search on all jobs based on custom date criteria.
  - **Query Recent**. Allows you to run a search on all recently run jobs.
  - **Query Builder**. Allows you to run a search based on specific parameters.
  - **Thread Monitoring**. Shows information about your currently running threads.
- **Config Manager tab**
  - **Users**. Provides some user details and the ability to perform some administrative tasks.
  - **Solutions**. Allows you to maintain the solutions and related resources stored in your repository

  - **Settings**. Contains Configuration Manager authentication options and group permissions mapping.

- **Usage tab**
  - **Usage Tracking**. Allows you to view a summary of your transaction usage for a specified period of time.
- **Users tab**
  - **Active Sessions**. Displays a list of all sessions currently active in your instance.
  - **Locks**. Shows details about users that are currently locked out and any failed login attempts on your server.

In addition, the following links are available at the top of the Output Transformation Server Manager interface:

- **Help**. Opens *OpenText Output Transformation Server Manager User Guide* in a new window.
- **Logout**. Contains the command to log out of Output Transformation Server Manager.

3.1 Info tab

The Info tab's Status page is the default view that is displayed after successfully logging into Output Transformation Server Manager.

3.1.1 Status

The Info tab's **Status** screen is comprised of two main area, **Server Status** and **Server Info**.

3.1.1.1 Server Status

The **Server Status** section allows you to view and change the server status.

The following tasks and fields are displayed:

- The **Reset Stats**,  , option resets all statistics in the Server Status and Server Info sections. This can be useful if you are trying to track a particular server info metric.
- The **Refresh Stats**,  , option updates the overall Server Status data to show any changes that occurred after the page was loaded, if available.
- The **Restart Output Transformation Server**,  , option stops and restarts the engine. You can enter an optional comment about the restart and this message will appear in the debug log.

- **Last Started**. Displays the date and time of when the server was last started.
- **Last Reset**. Displays the date and time of when the server was last reset. The statistic and server reset options will also reset any stored server statistics such as the number of jobs run and their average running time, while the refresh option updates the timestamp data of when the last reset took place, if available.
- **Jobs Run**. Indicates the number of jobs that have been run since the last reset.
- **Failed Jobs**. Indicates the number of jobs that have failed since the last reset.
- **Avg Time/Job**. Specifies the average amount of time, in milliseconds, needed to process each job.

3.1.1.2 Server Info

The Server Info section augments the Server Status information by displaying some daily job statistics in a graphical format and version information.

The following charts are shown:

- **Jobs Run Today**. Displays a pie chart that indicates the number of jobs that have been run during the current day and the proportion of total jobs that each job represents.
- **Running Jobs**. Displays the currently running jobs (includes both incomplete and completed jobs) on the server and the amount of time, in milliseconds, they are taking to process. Data on this chart is only displayed while the jobs are running.
- **Processing Time Today**. Displays the total processing time elapsed per process. The host and port info for the application server is displayed below the chart with each member representing a server within the cluster.

On this screen, you can also see the **Version**, **System ID**, and **Endpoint** (<*hostname*>:<*port*>) for your deployment. Following modifications to a deployment or patching to a new version, you can verify if the changes took effect by checking the product version that is running.

3.1.2 Logs

The Info tab's **Logs** screen is comprised of two main areas, **Log Profiles** and **Log Files.**

3.1.2.1 Log Profiles

The Log Profiles section allows you to analyze the log profiles that have been defined within Output Transformation Designer. These log profiles can also be activated or deactivated on this screen.

Log profiles are used by the system to specify the types of events to record. The logging profiles must be defined in Output Transformation Designer where you can also set up the detail level of the logs, the maximum size of individual log files, and how long the log files should be retained in the system. For more information on logging, see *OpenText Output Transformation Server - User Guide (VDTOTS-H-UGD)*.

The following columns are displayed:

- **Log Profile**. Denotes the name of the logging profile as specified in Output Transformation Designer.
- **Description**. Identifies any description registered for the logging profile in Output Transformation Designer.
- **Status**. Displays the current status of the logging profile. The log profiles can be switched between the enabled and disabled status using the **Enable log profile**,  , and **Disable log profile**,  , icons.

3.1.2.2 Log Files

The Log Files section displays all log files currently within your file system. Instead of returning to Output Transformation Designer to view the logs, you can select any log profile and click **View** to display the log file. You can apply filters to the selected log file using Java regular expressions to help narrow down the log entries shown. You can save the log entries currently shown to your system by clicking **Download**.

Monitoring logs in real time

The tail option is used to examine the latest events in a log file in real time. When enabled, new information written to a log is automatically displayed, which can be useful when attempting to debug issues in a project.

To enable log tails:

1. On the **Logs** screen, in the **Log files** list, select the log file you want to monitor.
2. Select the **Tail** check box.

   The log file view is automatically updated every 5 seconds and the latest log messages are displayed.

3.1.3 License

The Info tab's **License** screen includes the **License** and **Licensed Components** sections.

3.1.3.1 License

The License section displays the date that your license is valid until as well as the number of days until expiry. (For more information on licenses, see *OpenText Output Transformation Designer - User Guide (VDTOTS-H-UTD)*.) If you have received a new license file, you can deploy it on this screen as well.

Deploying a New License

There are two methods of deploying a new license from the License screen:

- Click **Choose File** and in the dialog that appears, navigate to the file path location where your license is saved.
- Drag and drop the license file into the **Drop License File Here** area, delineated by the dotted line.

A progress bar appears to display the status of the deployment and the **License is valid until** field is updated with the new license expiry date.

3.1.3.2 Licensed Components

The Licensed Components section allows you to view all the components installed by Output Transformation Server that you have a valid license to use. You can further expand each component to see which subcomponents are licensed.

3.1.4 Cluster

The Cluster screen displays a graphical representation of the nodes in your cluster, some information about each node, and provides the ability to activate or deactivate any slave nodes within your cluster.

Note: The Clustering tab only appears if your instance includes a cluster; this tab is automatically hidden for deployments running on a single server.

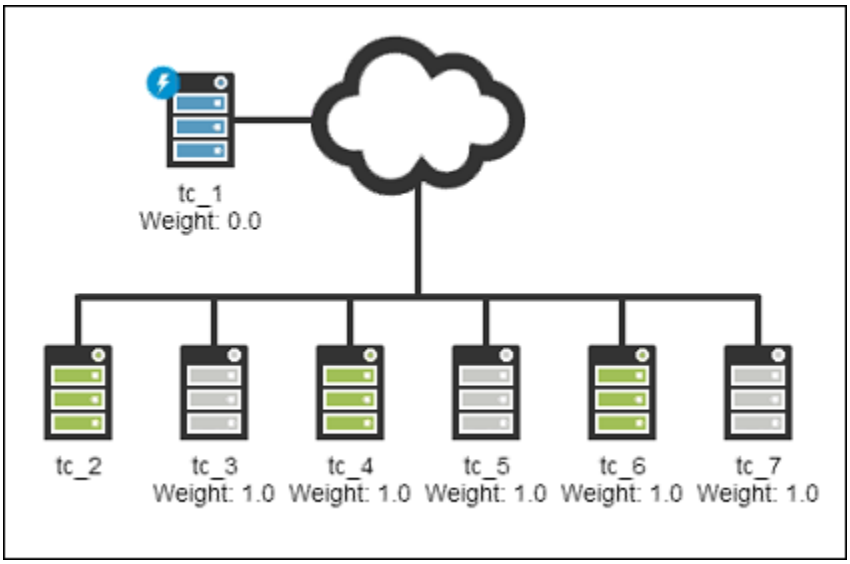

Figure 3-1: Sample Clustering Structure diagram on Cluster tab

The Cluster Structure diagram shows your master node on the left, represented by the blue server icon, and all slave nodes in your cluster below it, with each slave node icon representing a server in your cluster. Green slave nodes indicate that the server is active, while grey slave nodes indicate that the server is connected, but inactive. The server with on it indicates the server you are currently connected to through Output Transformation Server Manager.

Using the toolbar at the top of the screen, the following tasks can be completed:

- . Refreshes the cluster view to show any changes that occurred after the page was loaded, if available. If any servers are connected or disconnected, then refreshing displays the updated cluster info. Server statistics, however, can be refreshed by selecting a server to see its details.
- . Switches the server between **Active** and **Inactive** modes. This action is only available on slave nodes. When a server is disabled, no further jobs are sent to the server. When a server is activated, it can immediately begin to process jobs it is sent.

You can click on any nodes in your cluster to see details and statistics about the server. Directly beneath each node, the server's name is shown as well as its current coordinator weighting of the server load. The following information about the node is also displayed:

- **Name**. Specifies the name used to identify your server.
- **Role**. Denotes the server's role in your cluster, either **Master** or **Slave**.

- **Status**. Denotes your server's current status, either **Active** or **Inactive**.
- **Total Heap Size**. Indicates the total heap size for your server.
- **Last Started**. Displays the date and time of when the server was last started.
- **Last Reset**. Displays the date and time of when the server statistics were last reset.
- **Jobs Run**. Indicates the number of jobs that have been run since the last reset.
- **Avg Time/Job**. Specifies the average amount of time, in milliseconds, needed to process each job.
- **Show Threads**. Displays the Thread Monitoring screen for your currently selected node. For more information, see "Thread Monitoring Tab" on page 31.

3.2 Resources tab

The **Resources** tab provides information about projects and allows some project management tasks to be performed. The creating and editing of projects must be done within Output Transformation Designer, but you can add existing projects and start/stop them from within the Output Transformation Server Manager.

3.2.1 File System

The **File System** screen displays your mounted file system and allows some basic editing of resources to be performed.

As you navigate through the file system tree, double clicking on certain files like component definitions, logging profiles, and authentication scheme or system configurations displays an embedded text editor in a separate window where you can view the file's contents or make modifications to it. You can also view or modify a resource in the text editor by selecting the file and clicking **Open**. If you made any changes to the file in the text editor, you can keep the changes by clicking **Save** before exiting the window, while clicking **Close** exits the text editor without saving any changes. (When modifying system configuration files, all passwords are encrypted upon saving the file.)

Log files can also be viewed in the embedded text editor, however, they are limited to read-only mode. The following log file name extensions are displayed with only reading privileges:

- `.rpt`
- `.log`
- `.csv`
- `.textreport`

Files can be removed from the mounted file system by selecting a file and clicking **Delete**. Be aware that serious issues can occur, including system failure, if you delete critical system resources such as configuration files. A warning message is displayed

if you attempt to delete a critical resource and you must confirm the deletion to continue.

Note: If you want to mount a new file system, you must use Output Transformation Designer to complete this task.

3.2.2 Services

The **Services** screen displays a list of all services currently loaded to your repository by Output Transformation Server as well as the status of each service.

The following information is displayed:

- **Service Configuration**. Indicates the name of the service and if the service is not stored in your root directory, its location in the repository is also shown.
- **Status**. Indicates whether the service is currently running and its startup method. The icons beside the service configuration's name toggle between the statuses for the particular service. See "Managing Services" on page 22 for more information.

3.2.2.1 Managing Services

The Services screen enables you to start or stop services and administer their startup method from within the Output Transformation Server Manager instead of using Output Transformation Designer.

The Status column indicates whether a service is already running and its current startup method. Using the icons beside the service configuration's name, you can switch between the appropriate actions you can complete for your service:

- The startup method can be switched between **Set to auto start**, , and **Set to manual start**, .
- The current service status can be switched between **Start Service**, , and **Stop Service**, .

3.2.3 Component Pool

The Component Pool screen presents a summary of all components currently loaded by Output Transformation Server along with some configuration details and statistics.

The following details are displayed on the **Component Pool** screen:

- **Component**. Indicates the name of the job uploaded to your server.
- **Alias**. Specifies the name that identifies the job when installed. Once deployed, this name cannot be modified.

- **Initial Pool Size**. Denotes the number of instances that will be created at startup.
- **Max Pool Size**. Indicates the maximum number of instances that will be stored, with a value of zero (0) meaning that there is no limit.

The following actions can be performed in the Component Pool table:

- **Add New Component**. Adds a new component pool entry to the repository.
- **Clear Component Pool**. Refreshes the component pool. This function is useful after performing changes to your environment for removing all components from the existing pool and rebuilding the component pool based on the settings for each component.
-  . Executes the selected project.
-  . Displays job performance statistics for your project.
-  . Edits the settings for the selected component or project.
-  . Deletes the selected component or project from your component pool, but leaves the files intact.

3.2.3.1 Adding a Component Pool Entry

To add a component pool entry to the repository:

1. On the **Component Pool** screen, click **Add New Component**.
2. On the **Add Component** screen, you can add the following information about your new component pool entry:
   - **Project Path**. Specifies a relative file path location to the main mount point on the server where the compressed component package is expanded. If using the file system root, then leave this value blank.
   - **Description**. Contains an optional description about your new component pool entry.
   - **Project Zip**. Denotes the compressed file containing all projects for extraction under the specified path. To upload a file, you can either click **Choose File** and in the dialog that appears, navigate to the file path location where your file is saved, or dragging and dropping the file into the **Drop Deployment Package Here** area, delineated by the dotted line.
   - **Initial Pool Size**. Denotes the number of instances that will be created during initialization.
   - **Maximum Pool Size**. Indicates the maximum number of instances that will be stored with a value of zero (0) meaning that there is no limit. For example, an initial pool size of 5 and a maximum pool size of 10 means that there are 5 instances of the project pre-loaded in memory. Subsequently, if

multiple jobs are run concurrently, the pool size is increased up to the maximum of ten instances. More than ten jobs can be run concurrently, but new instances of the project must be created first, which are then immediately deleted when the job ends.

- **Time Between Eviction Runs**. Specifies the amount of time, in milliseconds, that an object may remain in the pool before it is eligible for eviction. If the number of instances is greater than the initial pool size and any of the instances in the pool are not used within the eviction time, they will be dropped from the pool. This allows more items to be added to the pool during peak periods for faster processing, but once the peak period is over the instances are released, thus freeing memory and resources.

3. When you are finished setting your options, click **OK**.

3.2.3.2 Running a Job

To run a job:

1. On the **Component Pool** screen, locate the job you want to run in the table and click its respective **Execute**,  , button.
2. In the **Execute Job** dialog, you must specify the input file to use for the job you want to run. There are two methods of adding the input file:
   - Click **Choose File** and in the dialog that appears, navigate to the file path location where your input file is saved.
   - Dragging and dropping the input file into the **Drop Input File Here** area, delineated by the dotted line.
3. When you are finished, click **Execute**.

   The job is executed with the job status and some details appearing below. Click **OK** to close the dialog.

3.2.3.3 Viewing Job Statistics

To view job stats, on the **Component Pool** screen locate the job you want to see the performance statistics for in the table and click its respective **Statistics**,  , button. Then in the **Show Stats** dialog that appears, a graph displays the amount of time that has elapsed while each of your jobs have been running.

3.2.3.4 Editing a Component Pool Entry

To edit a component pool entry:

1. On the **Component Pool** screen, locate the component pool entry you want to edit in the table and click its respective **Edit**,  , button.
2. In the dialog that appears, modify the component pool entry settings you want to adjust. For more information on the component pool entry configuration settings, see "Cluster" on page 19.
3. When you are finished making your changes, click **OK**.

3.2.3.5 Removing a Component Pool Entry

To remove a component pool entry:

1. On the **Component Pool** screen, locate the component pool entry you want to delete in the table and click its respective **Remove**,  , button (only the component pool entry is removed; any files will remain behind).
2. In the dialog that appears, confirm that you want to delete the component pool entry from the component pool by clicking **OK**.

Note: There is no undo for this task, but you can always add the component pool entry again.

3.2.4 Schedule

The Schedule screen displays a list of all jobs and services scheduled for execution by the system and also allows for their administration without having to access Output Transformation Designer. Once the task has been scheduled, it is added to the system configuration parameters.

The following details are displayed on the **Schedule** screen:

- **Name**. Specifies the name of the scheduled task.
- **Type**. Specifies the type of resource scheduled to run, either a job or service.
- **Component**. Identifies the project or service configuration file to run.
- **Description**. Specifies a brief description to help you identify the scheduled task.
- **Next Start**. Denotes the date and time of when the job or service is next scheduled to be started.
- **Next Stop**. Denotes the date and time of when the job or service is next scheduled to stop.
- **State**. Designates the current status of the scheduled task.

The following actions can be performed on the **Schedule** screen:

-  . Reloads the Schedule screen with the latest scheduler data from the system configuration.
-  . Adds a new scheduled service to the list.
-  . Adds a new scheduled job to the list.
-  . Edits the configuration of the selected scheduled task.
-  . Deletes the selected scheduled task from the list.

3.2.4.1 Adding a New Scheduled Service

You can schedule new services directly from within Output Transformation Server Manager. Services can be scheduled to start and stop at your chosen time.

To schedule a new service:

1. On the **Schedule** screen, click **Schedule Service**,  .
2. In the dialog that appears, you must enter the following information about the new scheduled service:
   - **Name**. Designates the name used to identify your scheduled service.
   - **Service**. Specifies the deployed service to run. (If you cannot find your service in the list, make sure that it has been deployed to the server.)
   - **Enable**. Indicates that this scheduled task is active.
   - **Description**. Specifies a brief optional description to help you identify the scheduled task.
   - **Start At**. Denotes the time, in half hour intervals, at which the scheduled task should initialize.
   - **Stop At**. Denotes the time, in half hour intervals, at which the scheduled task should end.
   - **Repeat Every**. Indicates the days of the week the task should be triggered.
   - **Job Variables**. Specifies any job variables you want to add for your task.

     You can use the  and  buttons to add or remove job variables from the list.
3. When you are finished, click **OK**.

3.2.4.2 Adding a New Scheduled Job

You can schedule new jobs directly from within Output Transformation Server Manager. Jobs can be scheduled to start and stop at your chosen time.

To schedule a new job:

1. On the **Schedule** screen, click **Schedule Job**,  .
2. In the dialog that appears, you must enter the following information about the new scheduled job:
   - **Name**. Designates the name used to identify your scheduled job.
   - **Component**. Specifies the deployed component to run. (If you cannot find your component in the list, make sure that it has been deployed to the server.)
   - **Enable**. Indicates that this scheduled task is active.
   - **Description**. Specifies a brief optional description to help you identify the scheduled task.
   - **Run At**. Denotes the time, in half hour intervals, at which the scheduled job should initialize.
   - **Until**. Denotes the time, in half hour intervals, at which the scheduled job should stop repeating.
   - **With Interval**. Indicates the frequency between job runs. You can customize the time period using Hours, Minutes, or Seconds.
   - **Repeat Every**. Indicates the days of the week the task should be triggered.
   - **Job Variables**. Specifies any job variables you want to add for your task.

     You can use the  and  buttons to add or remove job variables from the list.
3. When you are finished, click **OK**.

3.2.4.3 Editing a Scheduled Task

You can make modifications to any existing scheduled tasks you have defined for your project from the Schedule screen.

To edit a scheduled task:

1. In the table on the **Schedule** screen, select the scheduled task you want to change.
2. Click **Edit**,  .

3. A dialog showing the configurable options for your task type is displayed and you can make your necessary changes in this window.
4. When you are finished, click **OK**.

3.2.4.4 Deleting a Scheduled Task

To delete a scheduled task:

1. In the table on the **Schedule** screen, select the scheduled task you want to delete.
2. Click **Delete**,  .

Note: There is no undo for this operation, but you can always add the scheduled task again.

3.3 Analysis tab

The Analysis tab permits the examination of all jobs loaded into your repository. You must enter a set of search parameters and the matching jobs are returned in a list.

3.3.1 Query By Date

The **Query By Date** screen allows you to conduct a search on all jobs based on the start and end dates you specify.

To search jobs by date:

1. On the **Query by Date** screen, click the **From** field.
2. In the calendar that appears, select the initial date that you want to run your search with.
3. Click the **To** field.
4. In the calendar that appears, select the end date that you want to run your search with.
5. Click **Run Query**.

Note: If you want to only see jobs that contain errors, select the **Only show jobs with errors** check box before running the query.

3.3.2 Query Recent

The **Query Recent** screen allows you to perform a search on all jobs based on various units of time

There are two separate ways of querying recent jobs, you can search for jobs run in the recent past or query jobs based on the length of time it took for the job to run.

To search for recent jobs:

1. On the **Query Recent** screen, select the **Query jobs run in the last** option.
2. In the **Query jobs run in the last** row, select the unit of time you want from the dropdown menu. You can choose from **Minute(s)**, **Hour(s)**, or **Day(s)**.
3. In the first field in the **Query jobs run in the last** row, enter a numerical value that corresponds with your selected unit of time that you want to base your search on.
4. If you want to see jobs that encountered errors as part of your results, select **Show jobs with errors**.
5. Click **Run Query**.

To search for jobs based on their elapsed running time:

1. On the **Query Recent** screen, select the **Query jobs running longer** than option.
2. In the **Query jobs running longer than** row, select the unit of time you want from the dropdown menu. You can choose from **Minute(s)** or **Second(s)**.
3. In the first field in the **Query jobs running longer than** row, enter a numerical value that corresponds with your selected unit of time that you want to base your search on.
4. Click **Run Query**.

3.3.3 Query Builder

Query Builder

The **Query Builder** screen allows you to conduct a search on all jobs based on criteria that you construct yourself. Multiple lines of query can be submitted simultaneously for more exclusive results.

To build a custom query:

1. On the **Query Builder** screen, from the **Field** dropdown menu select the name of the field you want to narrow your search to. You can choose from **Node**, **Alias Name**, **Runnable Name**, **Job ID**, **Start Date**, **Finish Date**, **Queue Time**, **Suspend Time**, **Run Time**, **Total Time**, **Input Size**, **Output Size**, **Invocation Method**, **Status**, **Failure Message**, **User Field**, **Warnings**, **Errors**, or **Critical Errors**.

2. In the **Operator** dropdown menu, select either **LIKE** or **=** to set your query to be either like or equal to the value in the **Value** field.
3. In the **Value** field, enter the value for your search criteria. Valid values vary based on the type of search criteria you selected in the Field menu. For instance, Start or Finish Date will only accept date values while Alias Name can accept alphanumeric characters.
4. If you wish to add more query lines to constrict your search to a smaller scope, click the **Add** button,  , and repeat steps 1 to 3 to set up a new query line. (Query lines can be deleted using the **Delete** button,  .)
5. Once you have finished setting up your query lines, click **Run Query**.

3.3.4 Understanding Query Results

The Results table is identical for all query types and by default, contains the following job information:

- **Node**. Specifies the repository or server that the job is stored on.
- **Alias Name**. Denotes the user-specified name used to identify the component.
- **Job ID**. Specifies the unique ID assigned to this particular execution of this job.
- **Start Date**. Displays the date and time that the project was executed.
- **Total Time**. Denotes the total amount of time, in seconds, that the project was running for.
- **Status**. Signifies the current status of the project. The status can be Running, Finished, or Errored.
-  . Exports your query results in a .CSV file for viewing outside the Output Transformation Server Manager. All data columns that are present in the results table are included in the exported file.
-  . Allows you to select optional data columns to add to the Results table. The following columns can be added to your Results table: Runnable Name, Finish Date, Queue Time, Suspend Time, Run Time, Input Size, Output Size, Invocation Method, Failure Message, Warnings, Errors, and Critical Errors.

3.3.5 Thread Monitoring Tab

The **Thread Monitoring** screen shows information about your currently running threads and locate deadlocks across your clustered nodes to help you oversee the state of your threads and jobs.

Across the top of the screen, all the **Nodes** in your cluster are shown and you can opt whether to include thread and job information about a particular node by selecting or clearing its respective check box.

Within the **Threads** tab, the following actions are available:

- **Search**. Filters the list of threads and jobs shown to help you find a particular one. As you type in the text box, only entries from the thread name and stack trace fields matching your search criteria are shown.
- **Jobs**. Designates that only jobs are shown in the list pane. By default, this setting is disabled.
- The **Detect Deadlocks**,  , option examines your system for any deadlocked threads and if detected, displays them on a separate tab.
- The **Refresh**,  , option updates the overall status data to show any changes that occurred after the page was loaded, if available.

Within the Threads tab, selecting a particular thread or job from the list pane on the left displays the following details:

- **Name**. Indicates the name used to identify the thread or job.
- **Job ID**. Specifies the unique number generated for the execution of the job. The identification number follows an `<instance_name>_<YYYYMMDD_HHMM>_<incremental_number>` format.
- **State**. Displays the current status of the thread or job.
- **Total Blocked**. Indicates the number of times the particular thread was blocked while entering or reentering a monitor.
- **Total Waited**. Indicates the number of times the particular thread had to wait for notification.
- **Stack Trace**. Displays a list of method calls that were running leading up to the point where an exception was thrown.

3.4 Config Manager tab

The Config Manager tab provides information about the Configuration Manager instance, which is a repository that stores process flows, project configurations, and other resources that can be shared between team members. This tab only appears if the Configuration Manager feature is properly licensed and you have set it up in Output Transformation Designer. (For more information on setting up Configuration Manager, see *OpenText Output Transformation Server - User Guide (VDTOTS-H-UGD)*.) The Config Manager tab consists of the **Users**, **Solutions**, and **Settings** screens.

3.4.1 Users

The **Users** screen allows you to complete some administrative duties on user accounts and provides some basic information about their account status.

The following administrative tasks can be performed on this screen:

-  , **Add User**. Displays the **Add Configuration Manager User** dialog box where you can configure the properties for a new user.
-  , **Edit User**. Displays the **Edit Configuration Manager User** dialog box to edit the existing properties for an existing user account.

The Users table displays the following information about each user:

- **User Name**. Denotes the user name registered to the user account. Be aware that this field is mandatory when setting up a new account and the user name cannot be modified once it has been created.
- **First Name**. Indicates the first name registered to the user account.
- **Last Name**. Indicates the last name registered to the user account.
- **Email**. Denotes the email address associated to the user account.
- **Is Admin**. Indicates whether the user possesses an administrator role. Be aware that you cannot modify this status once it has been created. Instead, you can disable the account to remove all access privileges until you can delete the user from your database management application.
- **Enabled**. Specifies whether the user account is active.
- **External**. Indicates whether the user account is stored externally.

3.4.2 Solutions

The **Solutions** screen allows you to maintain the solutions and related resources stored in your Configuration Manager repository. The following information and actions are available on this screen:

- , **Sync Solution**. Resynchronizes the solution with the version stored in the repository.
- , **Drop Solution**. Drops the solution from the repository.
- **Name**. Specifies the name of the solution.
- **Description**. Indicates a brief user-provided summary of the solution.
- **On Local File System**. Denotes whether the solution is stored on your local file system.

Note: For more general information on solutions, see *OpenText Output Transformation Server - User Guide (VDTOTS-H-UGD)*. Furthermore, you can also oversee your solutions using the Solution Manager in Output Transformation Designer. For more information on the Solution Manager, see *OpenText Output Transformation Server - User Guide (VDTOTS-H-UGD)*.

3.4.3 Settings

The **Settings** screen contains authentication options and is where you can manage the permissions that different user types hold through group mapping.

You can only map group permissions to users for Configuration Manager on this screen if you are using external authentication. Consequently, you must select the **Use External Authentication** check box before you can access the mapping options.

To assign permissions, simply map a group to the user role you want to have access by moving the group(s) from the **Available Groups** pane to either the **Administrator role** or **User role** panes. You can move groups between panes by using the respective › and ‹ buttons for each user role. The groups are mutually exclusive, so an individual group can only be assigned to either Administrators or Users at any given time.

The **Filter Group** field is also available to assist with narrowing down the group names that appear in the **Available Groups** pane. When searching for groups, be aware that this field is case sensitive.

When you are finished assigning permissions, you must click **Apply** to save your changes.

3.5 Usage tab

The Usage tab allows you to view usage summary data, according to payload or transactions, in both graphical and tabular format. Having the ability to review your company's transaction usage can be useful for performance monitoring, problem solving, and troubleshooting, as well as for ensuring that your usage is in compliance with your contractual commitments.

Note: To ensure that the usage tracking functionality has been properly activated, see "Enabling Usage Tracking" on page 34.

3.5.1 Enabling Usage Tracking

To activate the usage tracking functionality, you must enable it through one of the following methods:

- **Transaction Monitoring.** Ensure that the **Turn Transaction Monitoring On** check box on the **Usage Tracking** screen is selected. This will already be enabled if transaction logs are activated. Disabling this option hides the report settings on this screen, and no transactions will be logged. However, if your license is usage-based, this parameter cannot be disabled and all transactions are logged automatically. For more information, see "Tracking Usage by Transactions" on page 35.
- **Transaction Log**. In the system configuration file (`default.xSystemConfig`), ensure the **TransactionLog** parameter has its **IsActive** value set to true. For more information, see *OpenText Output Transformation Server - User Guide (VDTOTS-H-UGD)*.

3.5.2 Tracking Usage by Payload

The **Payload** screen allows you to view a summary of your usage based on the payload, or the actual transmitted data, for a specified period of time.

To view your payload usage:

1. On the Payload screen, specify a time frame using the **Date Range** dropdown list.

   If you select Date Range, enter a start and end date in the subsequent fields. Clicking in each date field displays a calendar from which you can select the desired date. Additionally, you can use the **Pre-Fill** dropdown menu on the far right to automatically populate your date range. Alternatively, you can also type directly into the date range fields to manually override these values.

   If you select **Recent Day(s)**, **Recent Week(s)**, **Recent Month(s)**, or **Recent Year(s)**, enter the desired number in the adjacent field. The default value is 1.

2. Select a time interval from the **Interval** dropdown list. This determines the unit of time represented on the line graph's x-axis. Choose from **Week** (default value), **Month**, or **Year**.

3. Click **Run Report** to generate the payload usage report.

   A line graph showing the payload sizes for the specified time period as well as a table summarizing the values appears.

3.5.3 Tracking Usage by Transactions

The **Track Usage** screen allows you to view a summary of your transaction usage for a specified period of time.

To view your transaction usage:

1. On the Track Usage screen, specify a time frame using the **Date Range** dropdown list.

   If you select **Date Range**, enter a start and end date in the subsequent fields. Clicking in each date field displays a calendar from which you can select the desired date. Additionally, you can use the **Pre-Fill** dropdown menu on the far right to automatically populate your date range. If you want, you can type directly into the date range fields to override these values.

   If you select **Recent Day(s)**, **Recent Week(s)**, **Recent Month(s)**, or **Recent Year(s)**, enter the desired number in the adjacent field. The default value is 1.

2. Use the **Usage Tracking** dropdown list to specify the usage type. You can choose from **Pages Generated** (default value), **Documents Generated**, **Pages Parsed**, **Documents Parsed**, or **Number of Jobs**.

3. Select a time interval from the **Interval** dropdown list. This determines the unit of time represented on the line graph's x-axis. Choose from **Year** (default value), **Month**, or **Day**.

4. The **Usage Threshold** field indicates the maximum usage allowed as defined in your contract. The default value is 100,000.

5. Click **Run Report** to generate the transaction usage report.

   The top of the report displays usage statistics in a line graph format, depicting usage over the specified period of time.

   The bottom portion of the report displays usage statistics in tabular format with the following information:

   - **Timeframe**. Indicates the time frame as depicted along the graph's x-axis. The unit of time (year, month, or day) corresponds to the value selected in the **Interval** field.
   - **Usage**. Displays the transaction usage for the specified time frame based on the **Usage Tracking** value selected.
   - **Cumulative**. Displays the cumulative usage for all time frames.

3.6 Users tab

The Users tab allows you to fulfill some administrative duties on user accounts, and view active session statistics as well as data about failed login attempts for your server.

3.6.1 Active Sessions

The **Active Sessions** screen shows a list of all sessions currently active for your instance. The following details about each session is displayed:

- **Username**. Specifies the username for the account used to log in to the session.
- **Last Request**. Indicates the date and time of when the last request was sent for the session.
- **Creation Time**. Indicates the date and time of when the session was first initialized.
- **Remove Session**. Disconnects the selected the session and logs out all connected users. First, select the check box in this column for the session you want disconnected and then click **Remove Sessions**. Multiple sessions can be selected at one time.

3.6.2 Locks

The **Locks** screen displays details about users that are currently locked out and any failed login attempts on your server.

The table in the **Locked Users** section shows the following information:

- **Username**. Specifies the username for the account currently locked out.
- **End Of Lockout**. Indicates the date and time of when the lockout period expires and will automatically be lifted.
- **Remove Lock**. Releases the lock from the locked user account so that they can login again. First, select the check box in this column for the user account you want unlocked and then click **Unlock**. Multiple users can be selected at one time.

The table in the **Failed Attempts** section shows the following information:

- **Username**. Specifies the username for the account that provided improper login credentials.
- **Number Of Retries**. Denotes the number of times the user account attempted to login.
- **Last Request**. Indicates the date and time the last login attempt was made.