

Using the vCenter Orchestrator Perspectives Plug-In

vCenter Orchestrator 4.1

vCenter Orchestrator 4.2

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VMware, Inc.
3401 Hillview Ave.
Palo Alto, CA 94304
www.vmware.com

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Using the VMware vCenter Orchestrator Perspectives Plug-In

Using the VMware vCenter Orchestrator Perspectives Plug-In provides information and instructions about installing, configuring, and using VMware vCenter™ Orchestrator Perspectives Web View.

Intended Audience

This documentation is intended for advanced vCenter and Orchestrator administrators who want to limit browser access to Orchestrator objects and workflows for individual users.

Installing and Configuring Perspectives

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Perspectives is an Orchestrator Web view that allows a limited group of users to run or schedule certain tasks through a Web browser, without logging in to the Orchestrator client. vCenter administrators can use Perspectives to create subsets of the standard Orchestrator workflow library and define the LDAP groups of users who can access each of these subsets.

A user perspective is the set of workflows that an LDAP user group can run. The members of the vCO Admin group can run all tasks in all user perspectives and can perform tasks that are related to the Perspectives Web view management.

The Perspectives plug-in is available as a separate download. You can use Perspectives with vCenter Orchestrator 4.1 and later to limit browser access to objects in the inventory and workflows in the library on a per-user basis.

This chapter includes the following topics:

- [“Install the Perspectives Plug-In,”](#) on page 7
- [“Configure the Perspectives Database,”](#) on page 8
- [“Database Connection Parameters,”](#) on page 8
- [“Set Up the Perspectives Web View,”](#) on page 9

Install the Perspectives Plug-In

To deploy the Perspectives plug-in, you must enable it on the **Plug-ins** tab of the Orchestrator configuration interface.

Prerequisites

- Download the `.dar` file containing the Perspectives plug-in.
- Verify that Orchestrator is configured properly.

For information about setting up Orchestrator, see the documentation about installing and configuring the respective Orchestrator version.

Procedure

- 1 Log in to the Orchestrator configuration interface as **vmware**.
- 2 Click **Plug-ins**.
- 3 Upload the Perspectives plug-in.
 - a Click the magnifying glass icon.
 - b Select the `.dar` file to install.

- c Click **Open**.
 - d Click **Upload and install**.
- 4 Click **Apply changes**.

What to do next

You must configure the database for the Perspectives plug-in and restart the Orchestrator server.

Configure the Perspectives Database

To be able to use Perspectives, you must configure the connection to the database in which to store plug-in specific data.

Procedure

- 1 Log in to the Orchestrator configuration interface as **vmware**.
- 2 Click **Perspectives**.
- 3 Select the database connection type.

Option	Description
Same as vCO	(Recommended) Store plug-in specific data in the Orchestrator database you already configured on the Database tab.
Custom	Stores plug-in specific data in a database different from the Orchestrator database. <ol style="list-style-type: none"> a From the Select/Change database type drop-down menu, select the type of database to use for Perspectives. NOTE Orchestrator supports Oracle and SQL Server databases. b Specify the database connection parameters. <p>Depending on the type of database you are connecting to, the required information might vary.</p>

- 4 Click **Apply changes**.
- 5 Restart the Orchestrator server.
 - a Click the **Startup Options** tab.
 - b Click **Restart service**.

The Perspectives plug-in configuration is updated successfully.

What to do next

You can start the Perspectives Web view by entering `http://orchestrator_server_DNS_name_or_IP:8280/vmo/perspectives` in a Web browser window.

Database Connection Parameters

To establish a connection to the database, you must specify the database connection parameters. Depending on the type of database you are connecting to, the required information might vary.

Table 1-1. Database Connection Parameters

Connection Parameter	Description
User name	The user name that Orchestrator uses to connect and operate the selected database. The name you select must be a valid user on the target database with db_owner rights.
Password	The password for the user name you entered.

Table 1-1. Database Connection Parameters (Continued)

Connection Parameter	Description
Database host IP address or DNS name	The database server IP address or DNS name.
Port	The database server port that allows communication to your database.
Database name	The full unique name of your database. The database name is specified by the SERVICE_NAMES parameter in the initialization parameter file.
Instance name (if any)	The name of the database instance that can be identified by the INSTANCE_NAME parameter in the database initialization parameter file.
Domain (SQL Server only)	To use Windows authentication, specify the domain name of the SQL Server machine, for example company.org . To use SQL authentication, leave this text box blank.
Use Windows authentication mode (NTLMv2)	Select to send NTLMv2 responses when using Windows authentication. This option is valid only for SQL Server.

Set Up the Perspectives Web View

To configure the Perspectives Web view, you must log in as a member of the vCO Admin group and create the first user perspective.

Prerequisites

You must have a working LDAP service on your infrastructure.

Procedure

- 1 Open a Web browser and go to `http://orchestrator_server_DNS_name_or_IP:8280/vmo/perspectives`.
- 2 Log in to the Perspectives Web view as a member of the vCO Admin group.
- 3 Click **Create your first perspective**.
- 4 Define the new user perspective.

Option	Action
Name	Enter a unique name for the user perspective.
LDAP group	Click the magnifying glass icon and select the LDAP group of users who can access this perspective.
Available workflows	Add the workflows that users can run in this perspective. <ol style="list-style-type: none"> a Click the magnifying glass icon. b Click Choose. c Select a workflow from the list or search for a workflow by entering text in the Search text box. d Click Select. e Repeat steps b through d for each workflow to add to the perspective. f Click Accept to add the selected workflows to the perspective.

- 5 Click **Submit**.

The Web view restarts and you are logged out of Perspectives.

You have created the first user perspective and the administrative perspective. The next time you log in to Perspectives as a member of the vCO Admin group, you can access the special administrative tasks for the Perspectives Web view through the **Manage perspectives** link.

You can view the Perspectives Management workflow folder on the **Inventory** tab of the Orchestrator client.

Setting the Perspectives User Permissions

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The Perspectives Web view does not handle user permissions. Within Perspectives, you can only define the LDAP group that can run the tasks available for a given perspective. You must grant the necessary permissions from the Orchestrator client.

This chapter includes the following topics:

- [“Allow User Access to Perspectives,”](#) on page 11
- [“Workflow User Permissions,”](#) on page 12
- [“Set User Permissions on a Workflow,”](#) on page 12
- [“Set User Permissions at the Root Level,”](#) on page 13

Allow User Access to Perspectives

To allow users who are defined as the audience of a perspective to run tasks, you must grant login permissions for the Perspectives Web view.

You select the users and user groups for which to set permissions from the users and user groups in the Orchestrator LDAP server. This procedure describes how to set permissions for the members of an LDAP group called **wittyusers**.

Prerequisites

You must be logged in to the Orchestrator client as a member of the vCO Admin group.

Procedure

- 1 Click the **My Orchestrator** view in the Orchestrator client.
- 2 On the **Permissions** tab, click the **Add access rights** link.
- 3 Type **wittyusers** in the **Filter** text box to search for the user group.
- 4 Click the user group in the search results and deselect the **Inspect** and **Execute** check boxes.
- 5 Click **Select**.
- 6 Click the **Actions** view.
- 7 Expand the hierarchical list of actions and navigate to the **com.vmware.perspectives** module.
- 8 Right-click the **com.vmware.perspectives** module and select **Edit access rights**.
- 9 Click the **Add access rights** link and search for **wittyusers**.
- 10 Click the user group in the search results and click **Select**.
- 11 Click **Save and close**.

- 12 Right-click the **com.vmware.perspectives.webview** module and select **Edit access rights**.
- 13 Click the **Add access rights** link and search for **wittyusers**.
- 14 Click the user group in the search results and click **Select**.
- 15 Click **Save and close**.

The members of the sample wittyusers LDAP group can log in to the Perspectives Web view and view the perspectives for which they are assigned as audience. However, they cannot run the tasks defined for their perspectives.

What to do next

Grant permissions on the workflows associated with user perspectives. See [“Set User Permissions on a Workflow,”](#) on page 12.

Workflow User Permissions

Orchestrator defines levels of permissions that you can apply to users or groups to allow or deny them access to workflows.

View	The user can view the elements in the workflow, but cannot view the schema or scripting.
Inspect	The user can view the elements in the workflow, including the schema and scripting.
Execute	The user can run the workflow.
Edit	The user can edit the workflow.
Admin	The user can set permissions on the workflow.

Permissions are not cumulative. For example, to grant a user full permissions, you must set all the permissions, not just Admin. All the permissions require the **View** permission.

If you do not set any permissions on a workflow, the workflow inherits the permissions from the folder that contains it. If you do set permissions on a workflow, those permissions override the permissions of the folder that contains it, even if the permissions of the folder are more restrictive.

Set User Permissions on a Workflow

Each task in Perspectives is associated with a workflow in the Orchestrator library. To be able to run the tasks from the Web view, the users assigned as the audience of a perspective must be granted the necessary permissions on the corresponding workflow and all of the referenced elements.

You select the users and user groups for which to set permissions from the users and user groups in the Orchestrator LDAP server. This procedure describes how to set permissions for the members of an LDAP group called **wittyusers**.

Prerequisites

You must be logged in to the Orchestrator client as a member of the vCO Admin group.

Procedure

- 1 Click the **Workflows** view in the Orchestrator client.
- 2 Expand the hierarchical list of workflows to navigate through the workflows in the Orchestrator library.
- 3 Right-click a workflow that you want to be available to the members of the **wittyusers** LDAP group and select **Edit access rights**.

- 4 Click the **Add access rights** link and search for **wittyusers**.
- 5 Click the user group in the search results and click **Select**.
- 6 Click **Save and close**.
- 7 Right-click the workflow and select **References > All elements used**.
- 8 Select an element in the list and click **Go to**.
- 9 Click the **Permissions** tab and verify that the **wittyusers** group is granted the **Execute** permission for the element.

You set the appropriate user permissions on a workflow and all of the elements it references.

Set User Permissions at the Root Level

You can allow a user group to log in to all published Web views and run all of the workflows in the Orchestrator library by setting the **View** and **Execute** permissions at the root level. You can use this method as an alternative way of handling the user permissions for the Perspectives Web view but it is less secure.

You select the users and user groups for which to set permissions from the users and user groups in the Orchestrator LDAP server. This procedure describes how to set permissions for the members of an LDAP group called **wittyusers**.

Prerequisites

You must be logged in to the Orchestrator client as a member of the vCO Admin group.

Procedure

- 1 Click the **My Orchestrator** view in the Orchestrator client.
- 2 On the **Permissions** tab, click the **Add access rights** link.
- 3 Type **wittyusers** in the **Filter** text box to search for the user group.
- 4 Click the **wittyusers** user group in the search results and verify that **View**, **Inspect**, and **Execute** check boxes are selected.
- 5 Click **Select**.

The members of the sample **wittyusers** LDAP group can do the following tasks:

- Log in to the Perspectives Web view, as well as any other published Web view.
- Log in to the Orchestrator client.
- View and run the tasks defined for their perspective.
- Run all Orchestrator workflows from other published Web views, the Orchestrator client and Web services.

What to do next

To avoid potential security issues, you can restrict the access to the Orchestrator client and disable the access to workflows from Web service clients.

Disable Access to the Orchestrator Client By Nonadministrators

You can configure the Orchestrator server to deny access to the Orchestrator client to all users who are not members of the Orchestrator administrator LDAP group.

By default, all users who are granted execute permissions can connect to the Orchestrator client. However, you can limit access to the Orchestrator client to Orchestrator administrators by setting a system property in the `vmo.properties` Orchestrator configuration file.

IMPORTANT If the `vmo.properties` configuration file does not contain this property, or if the property is set to false, Orchestrator permits access to the Orchestrator client by all users.

Procedure

- 1 Navigate to the following folder on the Orchestrator server system.

Option	Action
If you installed Orchestrator with the vCenter Server installer	Go to <code>install_directory\VMware\Infrastructure\Orchestrator\app-server\server\vmo\conf</code> .
If you installed the standalone version of Orchestrator	Go to <code>install_directory\VMware\Orchestrator\app-server\server\vmo\conf</code> .

- 2 Open the `vmo.properties` configuration file in a text editor.
- 3 Add the following line to the `vmo.properties` configuration file.

```
#Disable Orchestrator client connection
com.vmware.o11n.smart-client-disabled = true
```

- 4 Save the `vmo.properties` file.
- 5 Restart the Orchestrator server.

You disabled access to the Orchestrator client to all users other than members of the Orchestrator administrator LDAP group.

Disable Access to Workflows from Web Service Clients

You can configure the Orchestrator server to deny access to Web service requests, to prevent malicious attempts from Web service clients to access sensitive servers.

By default, Orchestrator permits access to workflows from Web service clients. You disable access to workflows from Web service clients by setting a system property in the Orchestrator configuration file, `vmo.properties`.

IMPORTANT If the `vmo.properties` configuration file does not contain this property, or if the property is set to false, Orchestrator permits access to workflows from Web services.

Procedure

- 1 Navigate to the following folder on the Orchestrator server system.

Option	Action
If you installed Orchestrator with the vCenter Server installer	Go to <code>install_directory\VMware\Infrastructure\Orchestrator\app-server\server\vmo\conf</code> .
If you installed the standalone version of Orchestrator	Go to <code>install_directory\VMware\Orchestrator\app-server\server\vmo\conf</code> .

- 2 Open the `vmo.properties` configuration file in a text editor.
- 3 Add the following line to the `vmo.properties` configuration file.

```
#Disable Web service access  
com.vmware.o11n.web-service-disabled = true
```
- 4 Save the `vmo.properties` file.
- 5 Restart the Orchestrator server.

You disabled access to workflows Web service clients. The Orchestrator server only answers Web service client calls from the `echo()` or `echoWorkflow()` methods, for testing purposes.

Managing Perspectives

To perform actions related to the management of the Perspectives plug-in, log in to Perspectives Web view or to the Orchestrator client interface as a member of the vCO Admin group.

This chapter includes the following topics:

- [“Create a Perspective,”](#) on page 17
- [“Clone a Perspective,”](#) on page 18
- [“Edit a Perspective,”](#) on page 19
- [“Reorder Tasks,”](#) on page 19
- [“Remove a Perspective,”](#) on page 20
- [“Reset the Perspectives Web View,”](#) on page 20
- [“Perspectives Workflows Library,”](#) on page 21

Create a Perspective

You can create a perspective to allow a specific LDAP user group to access and run a set of Orchestrator workflows through a Web browser.

Prerequisites

You must be logged in to the Perspectives Web view as a member of the vCO Admin group.

Procedure

- 1 Click the **Manage perspectives** link.
The links to the administrative tasks appear.
- 2 Click **Create perspective**.
- 3 Click **Start task** in the right pane.

- 4 Define the new user perspective.

Option	Action
Name	Enter a unique name for the user perspective.
LDAP group	Click the magnifying glass icon and select the LDAP group of users who can access this perspective.
Available workflows	Add the workflows that users can run in this perspective. <ol style="list-style-type: none"> Click the magnifying glass icon. Click Choose. Select a workflow from the list or search for a workflow by entering text in the Search text box. Click Select. Repeat steps b through d for each workflow to add to the perspective. Click Accept to add the selected workflows to the perspective.

- 5 Click **Submit**.

You can view the new perspective in the left pane of the Perspectives Web view and the **Inventory** tab of the Orchestrator client. The members of the LDAP group defined as the audience of this perspective can access the perspective at a direct URL address.

Clone a Perspective

You can create a perspective by using an existing perspective as a template.

Prerequisites

You must be logged in to the Perspectives Web view as a member of the vCO Admin group.

Procedure

- 1 Click the **Manage perspectives** link.

The links to the administrative tasks appear.

- 2 Click **Clone perspective**.
- 3 Click **Start task** in the right pane.
- 4 Select the perspective to clone from the drop-down menu, and click **Next**.
- 5 Type a name for the perspective.

The name must be unique.

- 6 (Optional) Click the magnifying glass icon and select the LDAP group of users who can access the perspective.

If you select a new LDAP group, the LDAP group defined for the original perspective is removed. You can define only one LDAP group as the audience of a given perspective.

- 7 (Optional) Click the magnifying glass icon and select the workflows that users can run in the perspective.

The workflows you select are added to the array of workflows defined for the original perspective. Use **Remove** to delete workflows from the list.

- 8 Click **Submit**.

You can view the new perspective in the left pane of the Perspectives Web view and the **Inventory** tab of the Orchestrator client. The members of the LDAP group defined as the audience of this perspective can access the perspective at a direct URL address.

Edit a Perspective

You can change the name, LDAP group, and available workflows properties of an existing perspective.

Prerequisites

You must be logged in to the Perspectives Web view as a member of the vCO Admin group.

Procedure

- 1 Click the **Manage perspectives** link.
The links to the administrative tasks appear.
- 2 Click **Edit perspective**.
- 3 Click **Start task** in the right pane.
- 4 From the drop-down menu, select the perspective to edit and click **Next**.
- 5 Type a name for the perspective.
The name must be unique.
- 6 (Optional) Click the magnifying glass icon and select the LDAP group of users who can access the perspective.
If you select a new LDAP group, the LDAP group defined for the original perspective is removed. You can define only one LDAP group as the audience of a given perspective.
- 7 (Optional) Click the magnifying glass icon and select the workflows that users can run in the perspective.
The workflows you select are added to the array of workflows defined for the original perspective. Use **Remove** to delete workflows from the list.
- 8 Click **Accept** to close the workflows array selector.
- 9 Click **Submit**.

The perspective is updated.

Reorder Tasks

You can change the order of tasks when you edit, create, or clone a perspective.

Prerequisites

You must be logged in to the Perspectives Web view as a member of the vCO Admin group.

Procedure

- 1 Click the **Manage perspectives** link.
The links to the administrative tasks appear.
- 2 Click **Edit perspective**.
- 3 Click **Start task** in the right pane.
- 4 From the drop-down menu, select the perspective to edit and click **Next**.
- 5 Click the magnifying glass icon to open the workflows array selector.
The array of workflows defined for the perspective appear.
- 6 Change the order of the workflows by clicking **Up** and **Down**.
- 7 Click **Accept** to close the workflows array selector.

- 8 Click **Submit**.

The order in which the workflows appear in the list corresponds to the order of tasks that users see when they log in to the perspective.

Remove a Perspective

When you run the **Remove perspective** task, you delete a perspective from the perspectives list and the Orchestrator client **Inventory** tab.

Prerequisites

You must be logged in to the Perspectives Web view as a member of the vCO Admin group.

Procedure

- 1 Click the **Manage perspectives** link.
The links to the administrative tasks appear.
- 2 Click the link to the **Remove perspective** task.
- 3 Click **Start task** in the right pane.
- 4 From the drop-down menu, select the perspective to delete and click **Submit**.

You deleted the perspective from the perspectives list and the **Inventory** tab of the Orchestrator client.

Reset the Perspectives Web View

You can run a workflow from the Orchestrator client that deletes the current configuration and content of the Perspectives Web view.

Prerequisites

You must be logged in to the Orchestrator client as a member of the vCO Admin group.

Procedure

- 1 Click the **Workflows** view in the Orchestrator client.
- 2 Select **Applications > Perspectives > Maintenance** to navigate to the Reset workflow.
- 3 Right-click the **Reset** workflow and select **Start workflow**.
- 4 Click **Submit** to run the workflow.

This workflow has no input parameters.

The **Reset** workflow runs successfully and the content of the Perspectives Web view is deleted.

What to do next

You can run the Initial configuration workflow from the Orchestrator client or log in to the Perspectives Web view as a member of the vCO Admin group and create the administrative perspectives.

Perspectives Workflows Library

The Orchestrator client interface provides access to workflows that let you perform actions related to the management of the Perspectives application.

You can access the Perspectives workflows library from the Workflows tab in the Orchestrator client interface.

Reset	Deletes the configuration and content of the Perspectives application. You can access this workflow from Applications > Perspectives > Maintenance .
Update	Updates the user permissions on all perspectives. You can access this workflow from Applications > Perspectives > Maintenance .
Clone perspective	Creates a duplicate of an existing perspective.
Create perspective	Adds a new user perspective.
Edit perspective	Modifies the properties of an existing perspective.
Initial configuration	Performs the initial configuration of the Perspectives application, creating the administrative perspective and the first user perspective. Accessible on first administrative login to the Perspectives Web view.
Remove perspective	Deletes an existing perspective without deleting the associated workflows.

Working with Perspectives

As a member of an LDAP group that has been assigned as the audience of a user perspective, you can run and schedule all of the tasks that are available for that perspective.

This chapter includes the following topics:

- [“The Dashboard and Tasks Views,”](#) on page 23
- [“Run a Task,”](#) on page 24
- [“Schedule a Task,”](#) on page 24

The Dashboard and Tasks Views

The Dashboard is the view that opens when you select a perspective. From the Dashboard, you can switch to another perspective, run a task, and schedule a task. The Tasks view of the Perspectives Web view opens when you select a task on the Dashboard view. The Tasks view lets you run a task, schedule a task, and view current and previous runs of the task.

The Dashboard and the Tasks view present the following tabs.

Active runs	Displays a list of the tasks that are currently running, waiting for user interaction, and waiting for an interruption. The list includes the task name, start date, state, business state, the user who started the task, and an option to respond to a user interaction request.
Scheduled runs	Displays a list of the tasks scheduled for a later time, including the next run date and time, the user who scheduled the task, the recurrence pattern of the task, and an option to cancel the scheduled task. The list contains information about tasks that are scheduled from the Orchestrator client and the Web views.
Completed runs	Displays a list of the most recent task runs, including the task name, start date, state, business state, the user who started the task, and a link that allows you to view details. The list includes records of tasks that are run from the Orchestrator client and from the Web views.
Events	Displays a list of the events that occur while the workflow is running, including the running status, the user who started it, and the time and date when the event started and ended. The information is stored in the VMO_LogEvent table in the Orchestrator database.

Run a Task

Running tasks from the Perspectives Web view is similar to running Orchestrator workflows from the Orchestrator client.

Prerequisites

- You must be assigned as the audience of at least one user perspective.
- At least one workflow must be available for your perspective.

Procedure

- 1 Open a Web browser and go to `http://orchestrator_server_DNS_name_or_IP:8280/vmo/perspectives`.
 - 2 Type your username and password and click **Sign In**.
All perspectives that are available to you appear as links.
 - 3 Click the perspective that contains the task to run.
 - 4 Click the link to the task to run.
 - 5 Click **Start task** in the right pane.
 - 6 Enter the workflow parameters and click **Submit**.
The workflow starts and the status details appear.
 - 7 When the task is completed, click **Close** to return to the Tasks view.
- You ran a task from the Perspectives Web view.

Schedule a Task

You can schedule a task to run once, or multiple times using a recurrence pattern. Scheduling a task in Perspectives is similar to scheduling a workflow in the weboperator Web view and the Orchestrator client.

Prerequisites

- You must be assigned as the audience of at least one user perspective.
- At least one workflow must be available for your perspective.

Procedure

- 1 Open a Web browser and go to `http://orchestrator_server_DNS_name_or_IP:8280/vmo/perspectives`.
- 2 Type your username and password and click **Sign In**.
All perspectives that are available to you appear as links.
- 3 Click the link to the perspective that contains the task to schedule.
- 4 Click the link to the task to schedule.
- 5 Click **Schedule task**.
- 6 Select the start date and time.
- 7 From the **Recurrence** drop-down menu, select the workflow recurrence pattern.
- 8 Select the recurrence end date and time.
- 9 Click **Next**.

10 Enter the workflow parameters and click **Submit**.

The workflow starts and the status details appear.

You scheduled a task from the Perspectives Web view.

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