

RoboClient User Guide

Trusted Operation Delivery for local identity, documents, Excel integration, plugins and distributed audit.

Trusted Operations

Identity-scoped execution and deterministic delivery.

Excel Bridge

Spreadsheet workflows connected to secure OTC envelopes.

Local Vault

Protected local state, documents and recovery flow.

Audit Ready

DLOG visibility for distributed operation traces.

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RoboClient User Guide

Document metadata

Document title: RoboClient User Guide (MI-4.0.5)

Audience: End users, operators, support staff

Version: 1.22

Date: 2026-07-05

Product: RoboClient (MI-4.0.5)

Document status: Draft / Internal distribution

1. Purpose

RoboClient is the local desktop application that manages a secure client identity and enables document workflows inside the MI platform.

For end users, RoboClient is primarily used to:

- keep local identity state for secure operations,
- work with documents through an embedded local API,
- provide predictable behavior across user sessions on the same Windows account.

RoboClient is designed to run in the background with predictable local state, so repeated use remains stable and consistent.

2. MI - Trusted Operation Delivery

Email delivers messages.

The web delivers information.

MI delivers trusted operations.

MI enables trusted execution of operations directly between parties while minimizing the infrastructure traditionally required to make those operations possible.

2.1 Problem

Modern systems are often built from disconnected trust layers:

- IAM,
- RBAC,
- tokens,
- sessions,
- API gateways,
- message brokers,
- synchronization engines.

Each layer increases cost, risk, latency and operational friction.

2.2 Solution

MI provides a unified trust fabric for executing operations between people, systems, AI agents and organizations.

It combines identity-scoped state, one-time command authorization, deterministic state delivery and offline-first execution into one operating model.

2.3 Why it matters

Operational friction becomes financial friction.

```
Trust friction
-> Operational cost
-> P&L impact
```

MI is designed to reduce the distance between intent and execution.

2.4 Who buys what

Role	What they buy
CTO	Reduced fragmented trust, integration chaos and operational risk
Architect	OTC, deterministic state, offline-first runtime and a unified trust boundary
CEO	Faster operations, lower friction and scalable execution
CFO	P&L impact, ROI, payback, avoided loss and risk reduction

2.5 Pilot model

1. Pick one process.
2. Measure current cost.
3. Deploy a controlled pilot.
4. Measure the result after 90 days.

2.6 Beachhead use cases

- regulated software delivery acceleration,
- engineering team onboarding,
- partner onboarding,
- healthcare workflow coordination,
- trustee document intake,
- AI agents executing controlled operations,
- cross-organization workflows,
- industrial digital initiative launch.

2.7 Core promise

Convert trust friction into measurable business outcomes.

3. What RoboClient does (high-level)

3.1 Runtime role

RoboClient acts as a local endpoint between:

- your user session,
- trust and identity operations,
- document handling capabilities exposed through local APIs.

3.2 Local data behavior

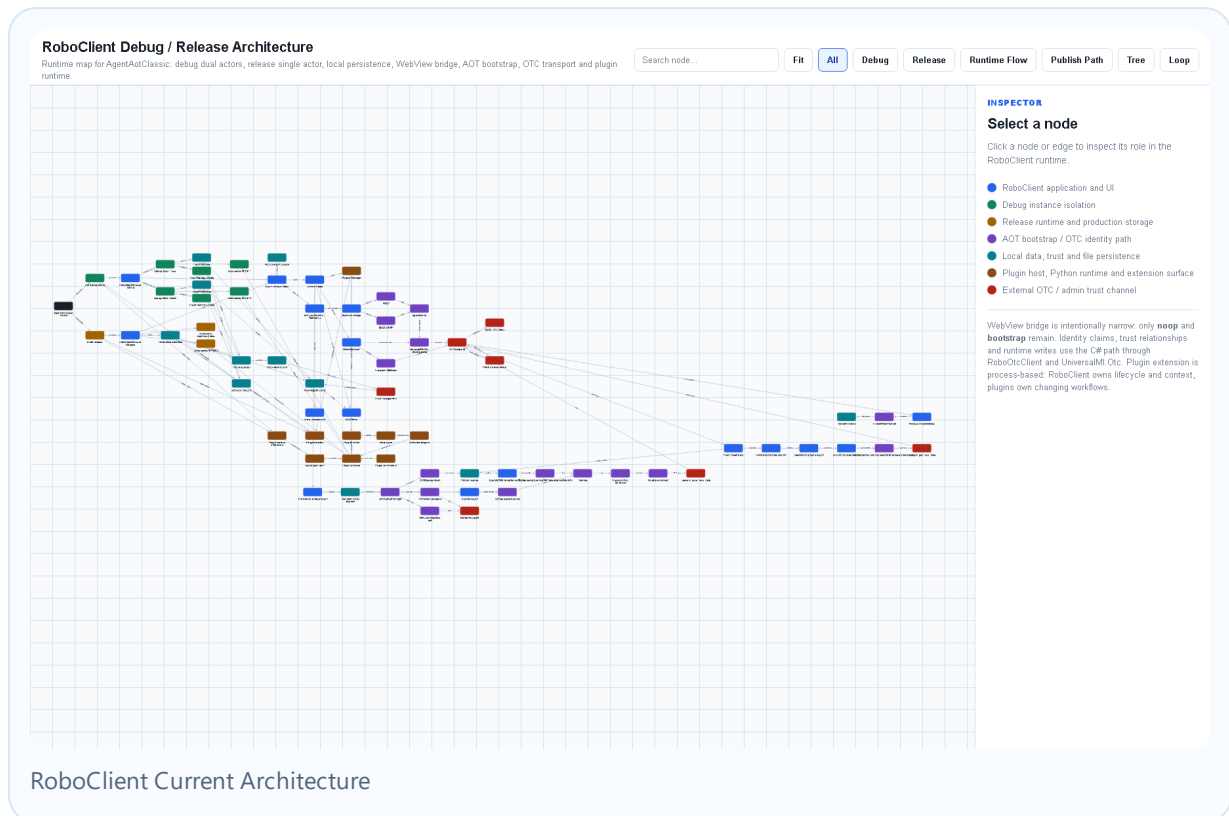
When you use RoboClient, the application creates and maintains files inside its local data folder.

These files are technical state objects required for correct operation.

3.3 Current architecture

The current RoboClient architecture combines the desktop client, local storage, WebView bridge, AOT native component, OTC communication path, plugin runtime and document runtime into one operator-facing application.

Current architecture map:



This map is used as a high-level runtime reference. It shows how debug and release paths, local persistence, trust handling, OTC communication and plugin execution relate to the user-facing RoboClient application.

3.4 Microsoft Excel extension

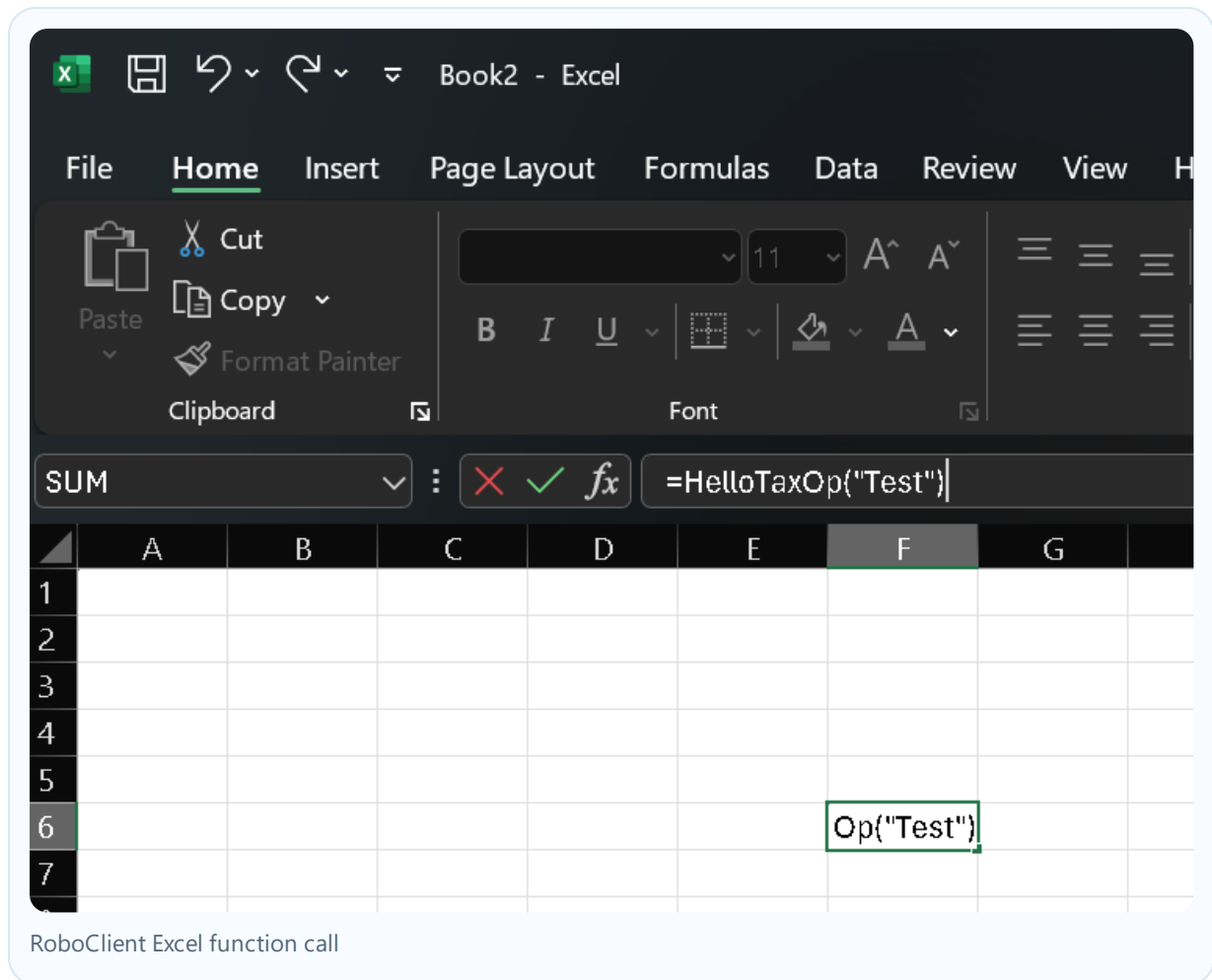
The Excel extension is an integration bridge between the customer's spreadsheet environment, local customer data and the Secure OTC Envelopes Fabric.

It allows Excel-based workflows to participate in the same controlled communication model used by RoboClient: local data stays under the user's operating context, while approved payloads can be prepared, signed, exchanged or routed through the secure OTC envelope layer.

1. Open Microsoft Excel.
2. Load the RoboClient/ExcelTaxOp add-in package provided with the installation.
3. If Excel shows a security notice for an unsigned add-in, confirm only when the add-in path is the expected trusted installation path.
4. Continue working in Excel after the add-in is enabled for the session.

The Excel extension is intended for environments where spreadsheet operations must connect to secure local identity, controlled client data and OTC envelope exchange without asking the user to manually handle transport or cryptographic details.

Example function call:



Correct function execution flow:

1. Enable the approved Excel add-in.
2. Select a worksheet cell.
3. Enter the function in the formula bar, for example:

```
=HelloTaxOp("Test")
```

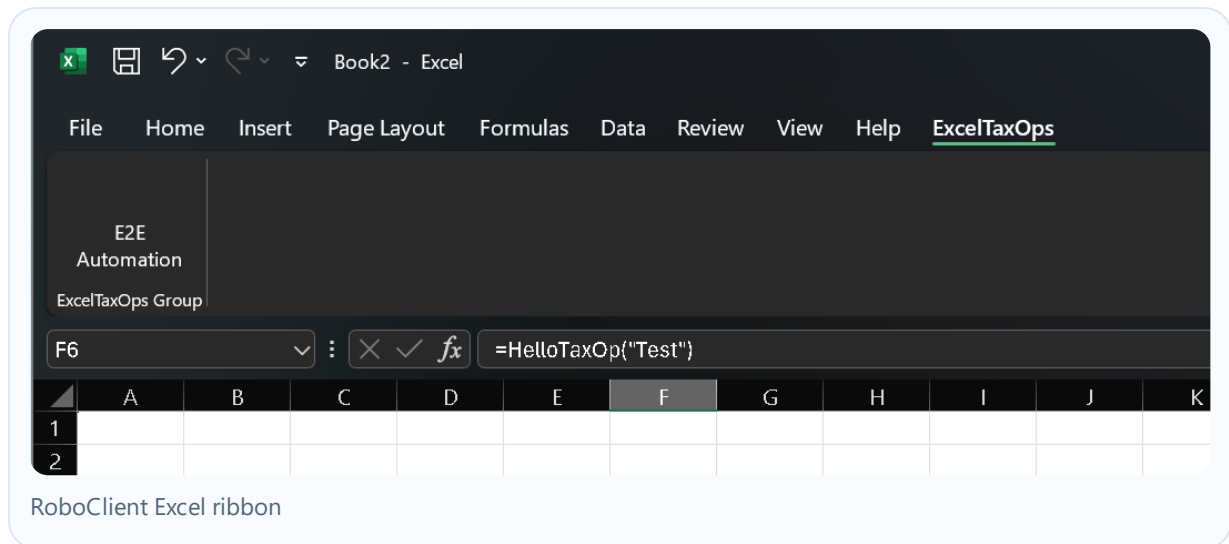
1. Press `Enter`.
2. Confirm that Excel returns the function result in the selected cell.

This verifies that the Excel add-in is loaded and can execute worksheet functions.

[illegible]

This is important for regulated or collaborative workflows because spreadsheet operations are no longer isolated local actions. They can become traceable events in a distributed system, with payload metadata, chunking/reconstruction information and audit messages available for review.

Excel ribbon example:



The Excel add-in can also expose a dedicated ribbon tab, for example `ExcelTaxOps` , with user-facing automation buttons such as `E2E Automation` .

This allows common workflows to be launched directly from Excel without asking the user to type formulas manually. Ribbon buttons can be used as entry points for controlled automation, secure data preparation, OTC envelope submission or customer-specific Excel workflows.

The ribbon is intended to make secure automation accessible to business users while keeping transport, identity and audit handling inside the approved add-in/runtime layer.

4. Where local data is stored

Default production location:

```
C:\Users\Public\roboFiles
```

This folder is part of normal operation and should be accessible by the current Windows account.

5. User lifecycle

5.1 How to start RoboClient

In a standard release package, start RoboClient by running:

```
RoboClientAot.exe
```

Typical release folder:

```
AgentAotClassic\release\RoboClientAot-x64
```

The user should launch `RoboClientAot.exe` from this folder. Supporting files and folders in the same directory are required by the application and should remain in place.

Common supporting items include:

Item	Purpose
<code>DocumentsApiRuntime</code>	Embedded local runtime for document workflows
<code>PluginRuntime</code>	Embedded local runtime for plugin execution
<code>Plugins</code>	Installed plugin content
<code>PluginSamples</code>	Example plugin content supplied with the package
<code>RoboClientView</code>	Local UI/view assets
<code>AgentAot.dll</code>	Native agent component used by RoboClient
<code>Global.dll</code>	Supporting application library
<code>UniversalMI.Otc.dll</code>	OTC communication library
<code>trust-admin-public.pem</code>	Public trust authority key used to validate trust data

Do not start supporting DLLs or runtime folders directly. They are loaded by RoboClient when needed.

5.2 Recommended desktop shortcut

For easier daily access, create a desktop shortcut that starts `RoboClientAot.exe`.

Recommended shortcut name:

```
Production Agent
```

Recommended target:

```
AgentAotClassic\release\RoboClientAot-x64\RoboClientAot.exe
```

Shortcut example:



The shortcut should point to the executable only. Do not create shortcuts to DLL files, runtime folders, plugin folders, or support assets.

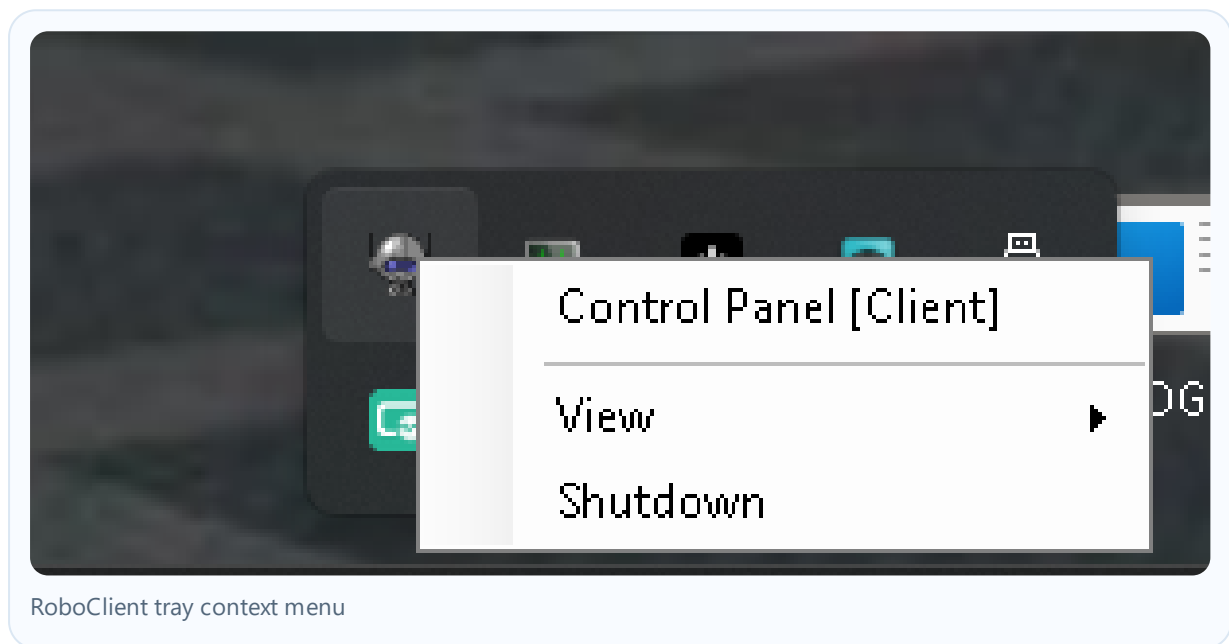
5.3 Tray context menu

After RoboClient starts, it is available from the Windows tray area. Right-click the RoboClient tray icon to open the context menu.

The top-level menu entries are:

Menu item	Purpose
<code>Control Panel [Client]</code>	Opens the RoboClient Control Panel for the current actor/client instance
<code>View</code>	Opens additional view options exposed by the client
<code>Shutdown</code>	Closes RoboClient and stops the local client session

Tray context menu example:



Use `Control Panel [Client]` for normal operator actions such as documents, trust status, recovery key access and local file workflows.

Use `Shutdown` when you want to close the application cleanly. Avoid killing the process from Task Manager unless support asks you to do so.

5.4 Control Panel

The Control Panel is the main operator window for RoboClient.

Control Panel example:



RoboClient Control Panel

The **Vault** section contains the primary user actions:

Control	Purpose
DOCUMENTS	Opens the Documents Collector for document intake, upload and stored file access
PLUGINS	Opens the plugin management area
PROVISION TRUST	Starts one-time trust provisioning for this client when no accepted trust relationship exists
RECOVERY KEY	Opens recovery key tooling for protected local data recovery workflows
CLEAR TEMP FILES	Removes temporary files created when documents are opened locally
FILES	Opens the local file explorer view for stored document access

The **Trust** section shows the current relationship state:

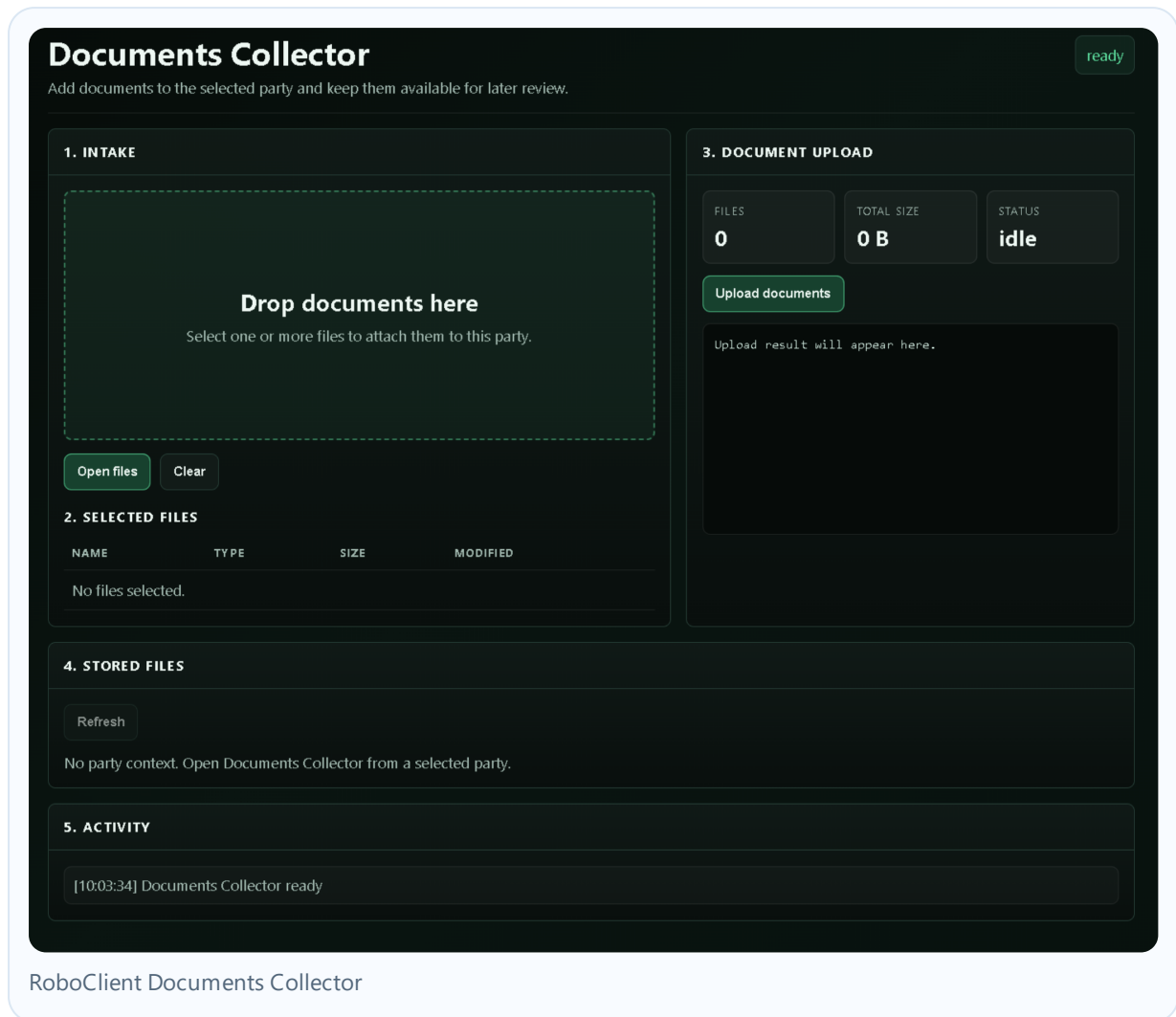
Field	Meaning
Peer	The trusted counterpart, when one is available
Role	The local and peer roles in the accepted relationship
Status	Current trust status, for example no accepted trust or accepted
DROP FILE	Starts a trust-aware file drop action when an accepted trust relationship is available

The bottom status area shows local actor and identity details that may be useful for support diagnostics.

5.5 Documents Collector

The Documents Collector is opened from the **DOCUMENTS** button in the Control Panel. It is used to attach documents to the selected party and keep them available for later review.

Documents Collector example:



The view is organized into five areas:

Area	Purpose
1. Intake	Drag files into the drop area or use <code>Open files</code> to select documents
2. Selected files	Shows files selected for upload before they are stored
3. Document upload	Shows file count, total size, upload status and upload result
4. Stored files	Lists documents already stored for the selected party
5. Activity	Shows recent local activity and status messages

Folders dropped into the intake area are ignored. Select files only.

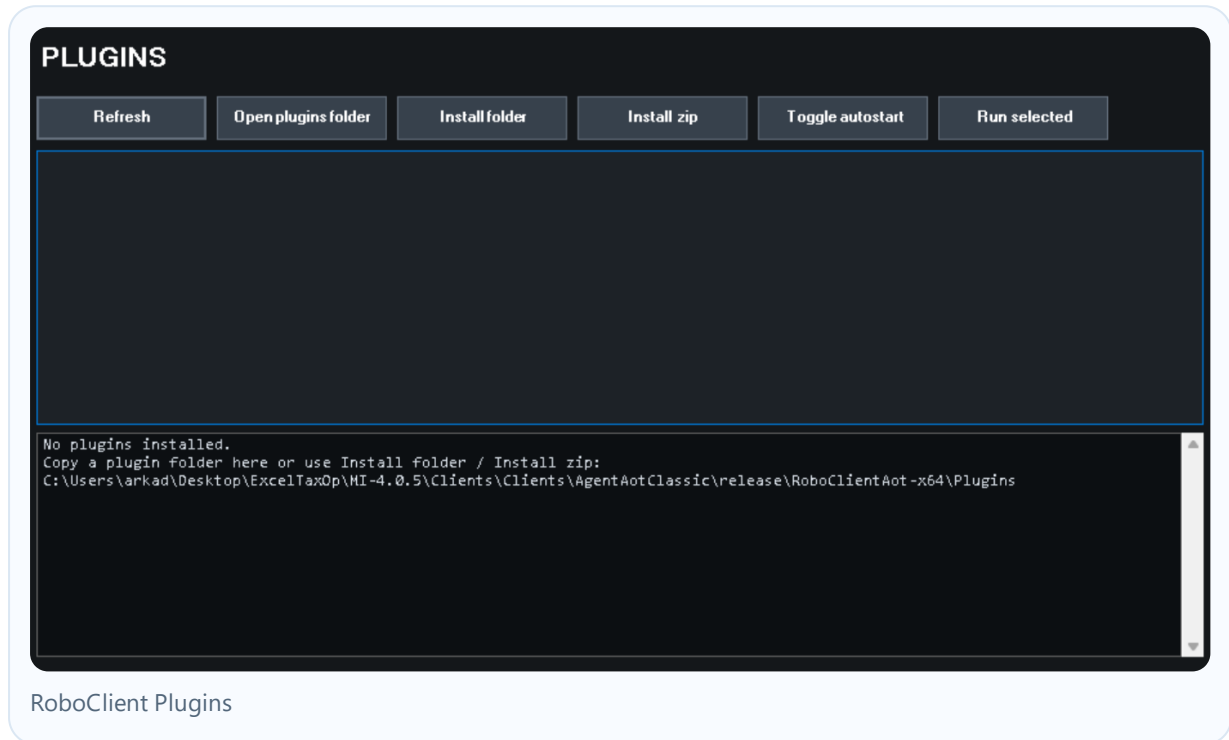
The `Upload documents` button stores the selected files for the active party context. If no party context is available, the view will indicate that Documents Collector should be opened from a selected party.

Use **Refresh** in **Stored files** to reload the current stored document list.

5.6 Plugins

The Plugins view is opened from the **PLUGINS** button in the Control Panel. It is used to inspect, install and run local RoboClient plugins.

Plugins view example:



The top toolbar contains:

Control	Purpose
Refresh	Reloads the installed plugin list
Open plugins folder	Opens the local plugin installation folder in Windows Explorer
Install folder	Installs a plugin from an unpacked folder
Install zip	Installs a plugin from a ZIP package
Toggle autostart	Enables or disables automatic plugin startup for the selected plugin
Run selected	Runs the currently selected plugin

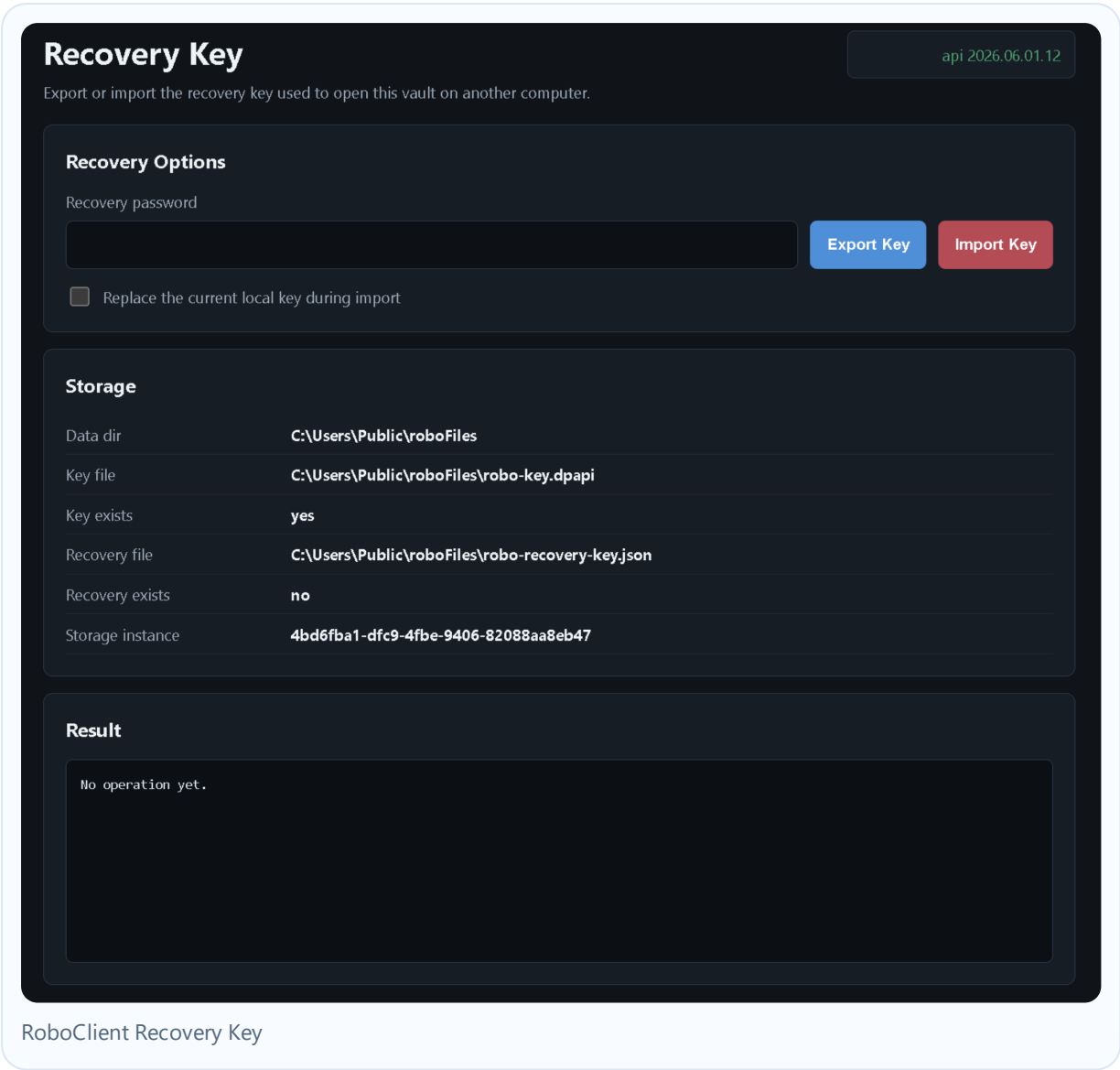
When no plugins are installed, the view shows the plugin folder path and explains that plugins can be copied there or installed using `Install folder` / `Install zip`.

Plugins should come from trusted sources only. Do not install unknown plugin packages.

5.7 Recovery Key

The Recovery Key view is opened from the `RECOVERY KEY` button in the Control Panel. It is used to export or import a recovery key for opening the local vault on another computer as part of a controlled recovery or migration process.

Recovery Key view example:



The view contains:

Area or control	Purpose
Recovery password	Password used to protect or unlock the recovery key operation
Export Key	Exports a recovery key file for the current local vault
Import Key	Imports a previously exported recovery key
Replace the current local key during import	Allows an import to replace the current local key when instructed by support
Storage	Shows current local storage details, including data directory, key file, recovery file and storage instance
Result	Shows the outcome of the last recovery operation

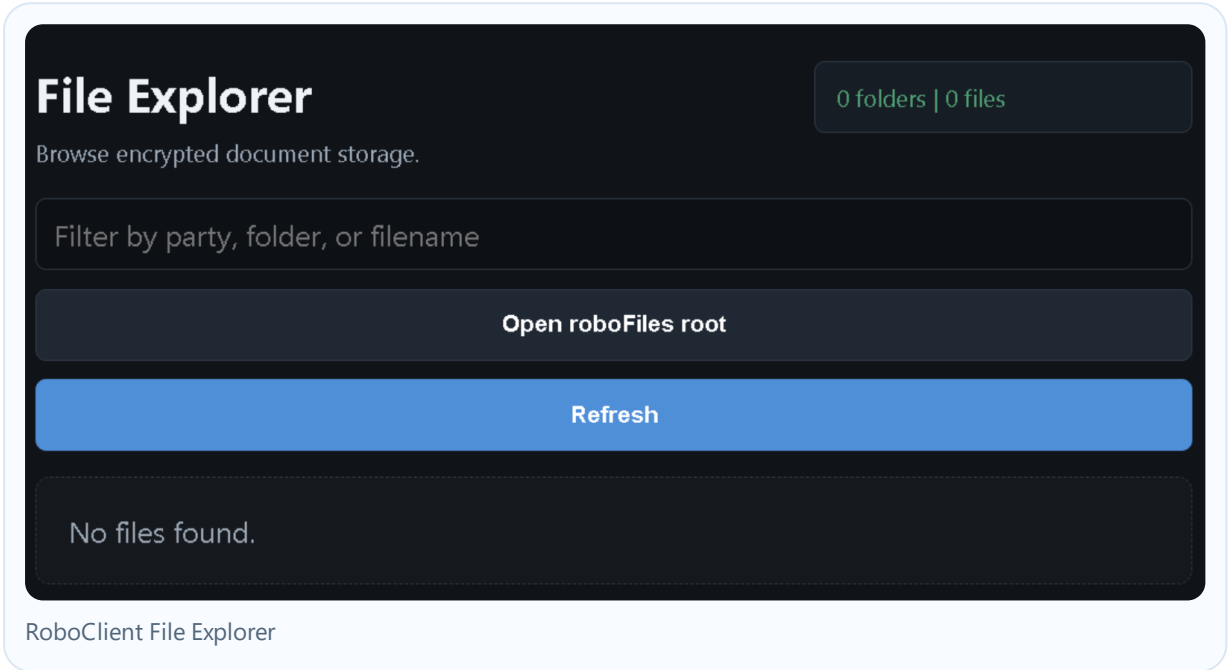
Treat exported recovery material as sensitive. Store it only in an approved secure location and do not send it through untrusted channels.

Use `Replace the current local key during import` only when performing a controlled recovery/migration and only when support or IT confirms that replacement is expected.

5.8 File Explorer

The File Explorer view is opened from the `FILES` button in the Control Panel. It is used to browse encrypted document storage managed by RoboClient.

File Explorer example:



The view contains:

Control or area	Purpose
Search/filter field	Filters by party, folder or filename
Folder/file counter	Shows how many folders and files are currently visible
<code>Open roboFiles root</code>	Opens the local RoboClient storage root in Windows Explorer
<code>Refresh</code>	Reloads the file list
File list area	Displays available stored files and folders

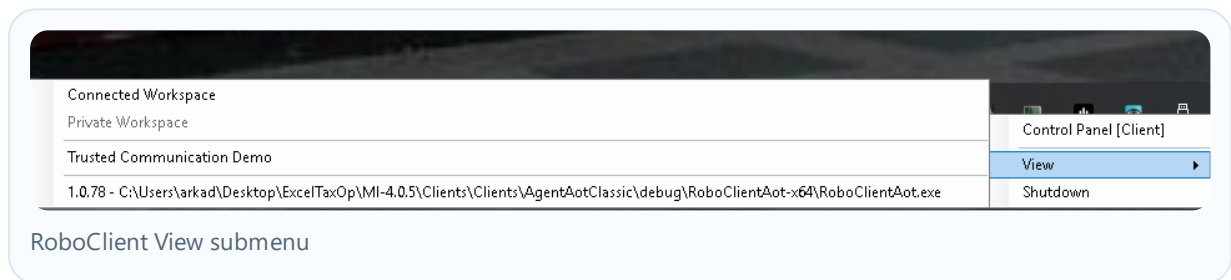
This view is for browsing and support visibility. Do not manually modify encrypted storage unless instructed by support.

5.9 View submenu

The **View** submenu exposes available RoboClient workspace views and runtime information.

View submenu item	Purpose
Connected Workspace	Opens the connected/cloud workspace view when available
Private Workspace	Opens the local/private workspace view when a full MI installation is available locally
Trusted Communication Demo	Opens the packaged showcase for controlled AI Research and Development communication
Version/path entry	Shows the current RoboClient view/runtime version and executable path

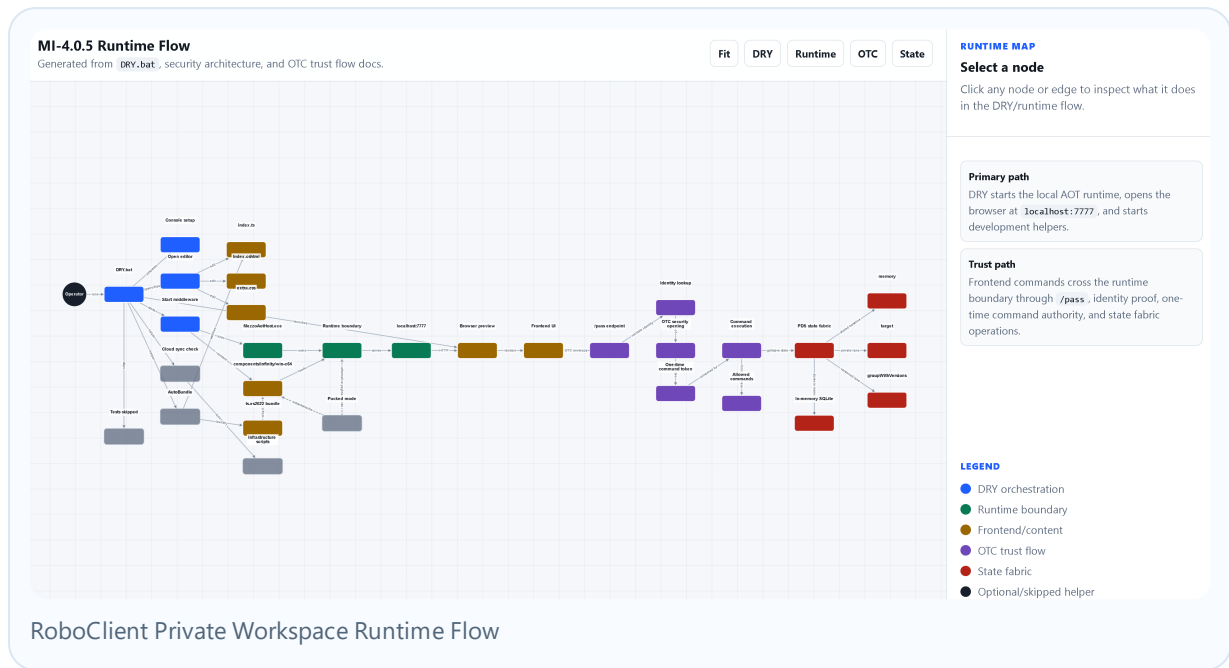
View submenu example:



Use the workspace views when instructed by your operator workflow or support team. The version/path entry is primarily useful for support diagnostics.

Private Workspace is intended for environments where a full MI installation is available locally. This mode is useful for organizations operating their own software production setup, including franchise-style deployments where the local party builds, customizes or operates MI-based software independently.

Private Workspace runtime flow example:



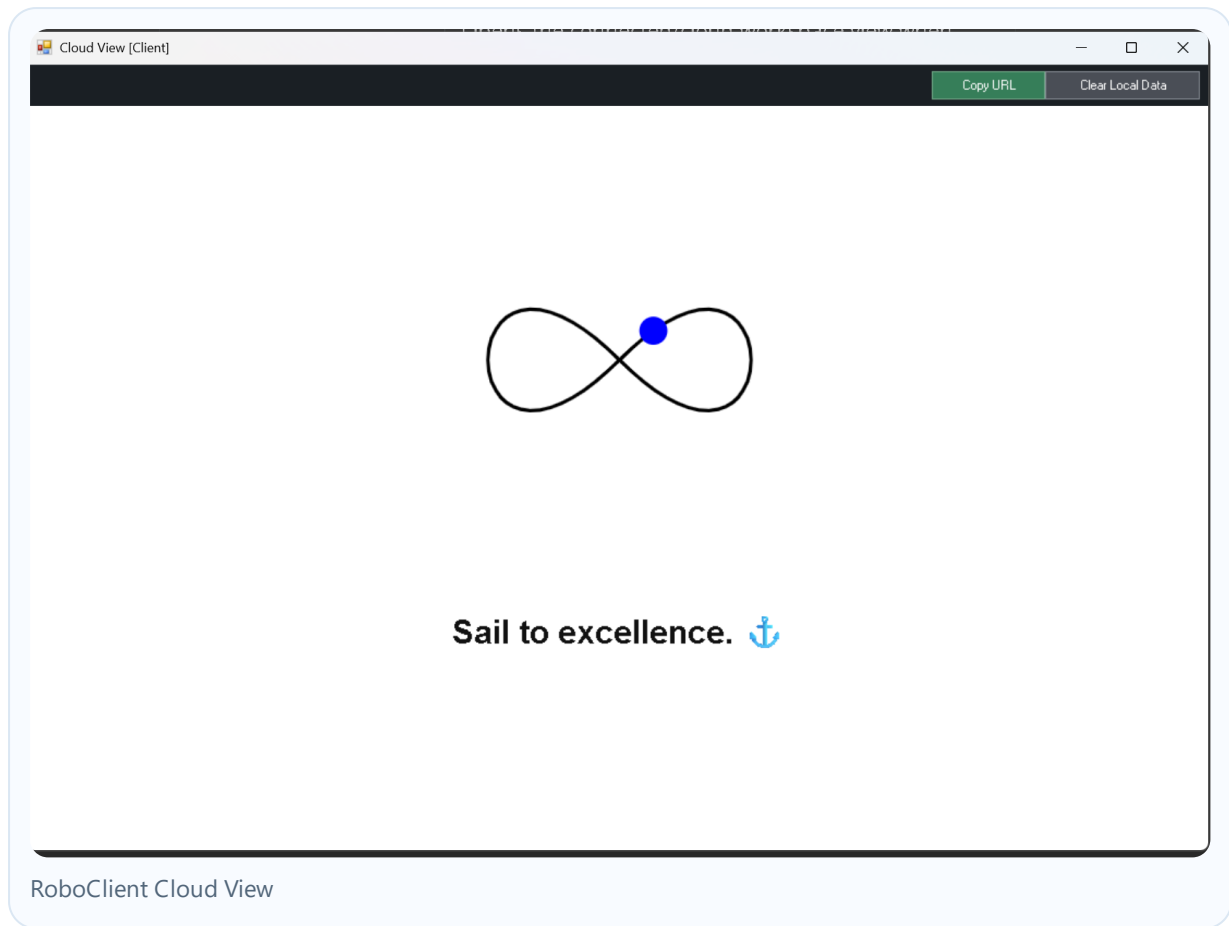
Private Workspace can be used when an organization wants to extend operations beyond a single workstation and involve its own team of people, tools and workflows. In this model, the local MI installation can coordinate runtime orchestration, trusted commands, state handling and OTC-backed communication while keeping ownership of the local production environment.

This is suitable for teams that want to build or operate their own software production capability on top of MI, while still using RoboClient as the controlled client entry point.

5.10 Connected Workspace window

The **Connected Workspace** option opens the cloud/connected workspace window.

Connected Workspace example:



The window contains:

Control	Purpose
Copy URL	Copies the current workspace URL for support, diagnostics or sharing with an authorized operator
Clear Local Data	Clears local browser/view data for this workspace view

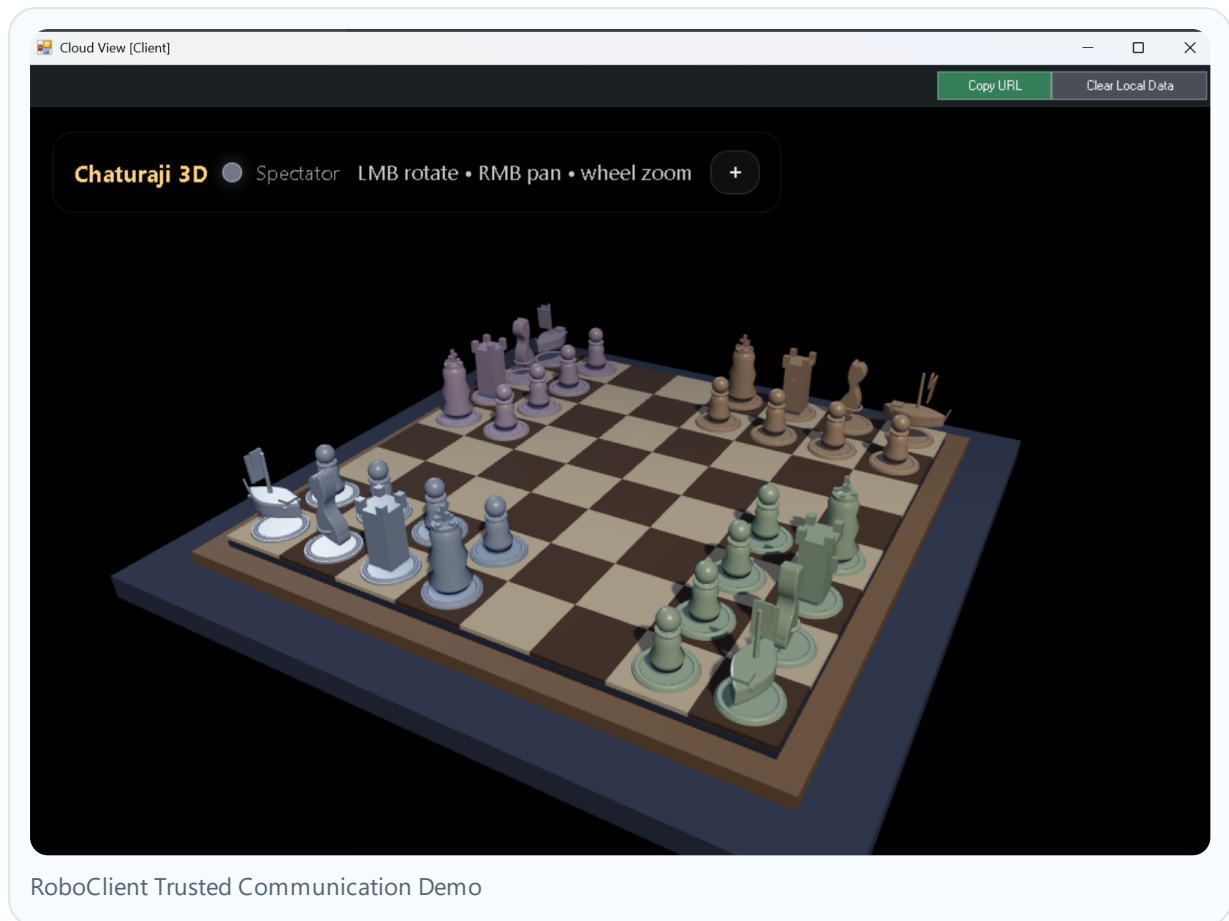
Use `Clear Local Data` only when the workspace view is stuck, stale, or support asks you to reset the embedded view state.

5.11 Trusted Communication Demo

The `Trusted Communication Demo` is a packaged showcase of controlled AI Research and Development communication.

It demonstrates how RoboClient can present a controlled workspace where participants, tools, trusted actions and research-oriented interactions can be staged in one client environment. The example is intended to show the product direction: secure local identity, controlled communication and interactive R&D surfaces can be combined without exposing the user to the underlying technical infrastructure.

Trusted Communication Demo example:



Use this demo as a product showcase or controlled demonstration environment. It is not required for normal document handling.

5.12 First launch

On first launch:

1. RoboClient starts initialization.
2. Local security state is prepared.
3. Identity-related features become available.
4. Document workflow can start when local document service is reachable.

5.13 Normal operation

During normal use:

1. Identity state is reused.
2. Local document operations (open/list/status) use the same persistent local context.
3. Trust-related actions remain consistent from session to session.

5.14 New device / new user account

Running the app on a different Windows user or machine changes local state assumptions.

Migration should be performed through approved IT procedures only.

6. Technical state files (brief)

These files are local runtime artifacts and not intended as user documents.

File or folder	What it stores	Why it exists
<code>Documents</code>	Local document storage folders and encrypted document data	Stores documents handled through RoboClient document workflows
<code>TempOpen</code>	Temporary files opened through local desktop applications	Allows users to preview/open documents using native Windows apps without making the temporary copy part of permanent storage
<code>actor-profile.json</code>	Local actor display/profile information	Keeps the visible actor name and local profile context stable between sessions
<code>robo-key.dpapi</code>	Local encryption root state	Enables protected local data operations in the current user context
<code>robo-identity.json</code>	Local identity metadata and signing material	Supports trust and signature-related operations
<code>storage-instance.json</code>	Storage instance identifier	Keeps document state consistent over local document sessions
<code>trust-registry.json</code>	Accepted or blocked trust relationship records	Allows RoboClient to remember established trust relationships and avoid repeating one-time provisioning

6.1 File descriptions

`Documents` contains the local document storage used by RoboClient document workflows. It is part of the application state and should not be rearranged manually.

`TempOpen` contains temporary copies created when a document is opened through a local Windows application. These files are operational working copies and may be cleared by RoboClient during cleanup.

`actor-profile.json` stores local actor profile information used by the Control Panel and local workflows. It helps RoboClient keep the same displayed actor context after restart.

`robo-identity.json` stores the local RoboClient identity. It includes public identity metadata and protected signing material used for trust and signed operations.

`robo-key.dpapi` protects the local encryption root using Windows user protection. It is required to recover protected local data.

`storage-instance.json` identifies the local document storage instance. It helps the document service detect whether storage state is consistent across sessions.

`trust-registry.json` stores trust relationship decisions already accepted or blocked for this RoboClient instance. When a trust relationship is accepted, RoboClient can treat provisioning as complete and keep trust-aware actions available without repeating setup.

These files and folders should be treated as one local state set. Do not delete, edit, move, or migrate individual items unless instructed by support.

7. What users should and should not do

7.1 Do

- Keep the folder `C:\Users\Public\roboFiles` writable by RoboClient.
- Let RoboClient start normally after restarts.
- Report unusual trust or document errors with time and short steps to reproduce.

7.2 Do not

- Do not delete any file from the local state folder manually.
- Do not copy selected state files between computers.
- Do not edit files inside `C:\Users\Public\roboFiles` unless approved by support.

8. Support guidance

If operation degrades, use this sequence:

1. Close RoboClient.
2. Restart RoboClient.
3. Re-run the same operation.
4. If the issue remains, send support a minimal issue report:

- machine name,

- date/time,

- exact action,

- last successful operation.

9. Troubleshooting (user-facing)

9.1 Trust operation fails repeatedly

Likely cause: local identity state issue.

Action: restart the application; if persistent, contact support.

9.2 Document service returns errors

Likely causes: temporary local service issue or local state mismatch.

Action: close the app, restart, retry.

9.3 Data appears inconsistent after move/migration

Likely causes: partial migration of local folder content.

Action: verify controlled migration; ensure full folder migration for local state if required by policy.

10. Support references

For support teams: treat the local state files as a single unit.

When investigating issues, collect logs and environment context before making manual filesystem changes.

11. Compliance and safety notes

- Local state files are functional security material.
- They are not user documents.
- Copying them outside formal migration procedures may break continuity.

11.1 Security analysis reference

The MI showcase includes a STRIDE-oriented security analysis:

MI-4.0.5\showcase\03_STRIDE_vs_OTC_Security_Analysis.pdf

This document positions OTC-based operation delivery against common STRIDE threat categories:

STRIDE category	MI/OTC security relevance
Spoofing	Identity-scoped operations and trust registry validation reduce reliance on anonymous transport identity
Tampering	Signed/enveloped payloads and deterministic state delivery make unauthorized modification detectable
Repudiation	DLOG and distributed audit records support traceability of executed operations
Information disclosure	Local protection, scoped payloads and controlled envelope exchange reduce unnecessary data exposure
Denial of service	Offline-first local execution reduces dependency on always-on synchronous services
Elevation of privilege	One-time command authorization and scoped trusted actions reduce broad standing privileges

For customers, this matters because RoboClient is not only a desktop utility. It is part of a security model where trusted operations can be prepared, authorized, delivered and audited with fewer disconnected infrastructure layers.

12. Revision history

Version	Date	Author	Change summary
1.22	2026-07-05	Internal engineering team	Added STRIDE vs OTC security analysis reference and customer-facing threat-model summary
1.21	2026-07-05	Internal engineering team	Added MI Trusted Operation Delivery executive context, vision, buyer map, pilot model and beachhead use cases
1.20	2026-07-05	Internal engineering team	Added Private Workspace runtime flow screenshot and team-extension use case
1.19	2026-07-05	Internal engineering team	Added Excel ribbon integration screenshot and ribbon-button workflow description
1.18	2026-07-05	Internal engineering team	Added distributed audit example showing Excel operations connected to DLOG through Secure OTC Envelopes Fabric
1.17	2026-07-05	Internal engineering team	Added Excel add-in function execution flow and example screenshot
1.16	2026-07-05	Internal engineering team	Added Microsoft Excel extension section and add-in startup/security notice guidance
1.15	2026-07-05	Internal engineering team	Added current architecture section and architecture map reference
1.14	2026-07-05	Internal engineering team	Added File Explorer screenshot and encrypted storage browsing guidance
1.13	2026-07-05	Internal engineering team	Added Recovery Key view screenshot and recovery workflow guidance
1.12	2026-07-05	Internal engineering team	Added Plugins view screenshot and plugin toolbar descriptions

Version	Date	Author	Change summary
1.11	2026-07-05	Internal engineering team	Added Documents Collector screenshot and user workflow description
1.10	2026-07-05	Internal engineering team	Added Control Panel screenshot and operator control descriptions
1.9	2026-07-05	Internal engineering team	Added Trusted Communication Demo as a controlled AI Research and Development showcase with screenshot
1.8	2026-07-05	Internal engineering team	Added Connected Workspace window screenshot and clarified Private Workspace local MI/franchise use case
1.7	2026-07-05	Internal engineering team	Added View submenu description and screenshot
1.6	2026-07-05	Internal engineering team	Added tray context menu screenshot to improve user guidance
1.5	2026-07-05	Internal engineering team	Added tray context menu description for Control Panel, View and Shutdown
1.4	2026-07-05	Internal engineering team	Added recommended desktop shortcut guidance for Production Agent launch
1.3	2026-07-05	Internal engineering team	Added release startup instructions and explanation of required files and folders beside RoboClientAot.exe
1.2	2026-07-05	Internal engineering team	Expanded local state reference with actor profile, trust registry, document storage and temporary open folder descriptions
1.1	2026-07-05	Internal engineering team	Full end-user orientation: purpose, flow, local state guidance, troubleshooting, migration and support instructions
1.0	2026-07-04	Internal engineering team	Initial local-state file draft

Prepared for production-ready customer-facing usage.

