AUTOMATION ANYWHERE
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Building Your First Automation Bot – Step List

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Purpose

In this use case, you will learn to use Automation 360 actions for creating a bot to automate a business process.

The key steps to be performed by the bot are:

- Extract customer data from a web portal into a CSV file.
- Open the CSV file and launch a CRM website.
- Populate the CRM webform.
- Save and send the CSV file to the relationship manager.

Prerequisite

- Access to the Automation Anywhere Community Edition:

  Access Automation Anywhere Community Edition and Register yourself. If you have already registered, log in to Community Edition using the URL that is mentioned in the Community Edition Welcome email that is sent to your email address.
- Microsoft Excel: You will need to have Microsoft Excel installed for the successful execution of the bot.

1. Register your device(s) and set user device credentials

a. Log in to Automation Anywhere Community Edition Control Room.

b. To register your device.

   i Click **Devices** under the Manage section, in the Navigation pane.

   ii Click the **Connect local device** icon from the Actions menu.

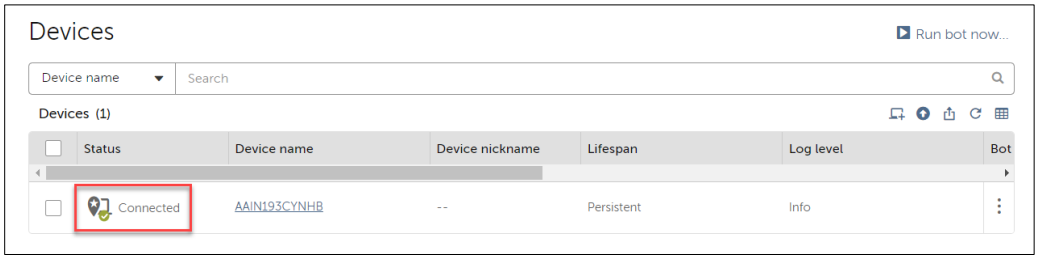
   iii Click **Connect to my computer**, wait until the Automation Anywhere Bot Agent downloads, and then install it.

   iv Follow the steps outlined in the wizard to install the Bot Agent.

   ***Note**: If your device's access to the Internet is controlled through an authenticating proxy server, you are prompted to provide the proxy server authentication details. These credentials are required for the device to communicate with the Control Room. To enable the authenticated proxy, register the device through a Chrome browser with the Automation Anywhere Chrome extension enabled.*

   v Enable the Chrome extension.

   vi Click **Done**.



c. Set user device credentials.

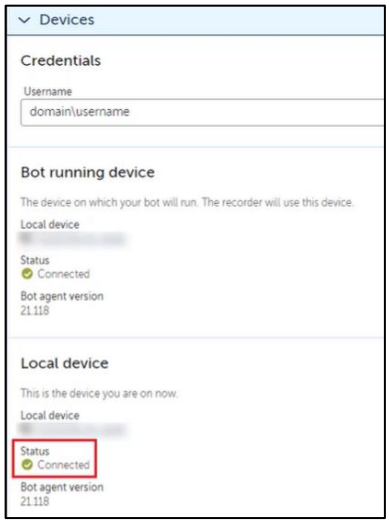
   i Click the **Username** in the Navigation pane.

   ii Click **My settings** in the flyout pane.

iii Navigate to Devices and enter the **Device username** in the corresponding field. If your username is part of a domain, include the domain within the format *domain**username*.

***Note**: To get the device username, type command **whoamI** in the Command Prompt. Note that these credentials are network dependent.*

iv Click **Save changes**.



Congratulations! You have now successfully registered your device and provided the login credentials for bot execution.

2. Create and structure the task bot

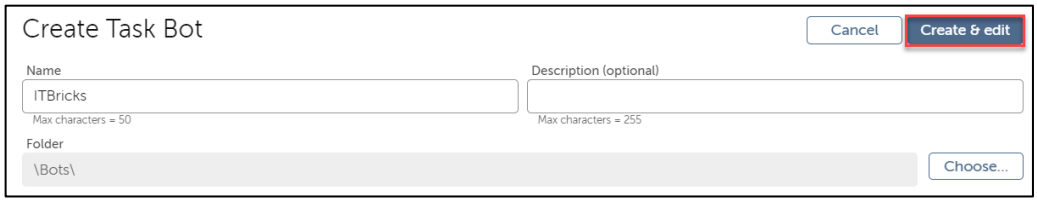
a. Create a task bot.

i Click the **Create a bot** link, in the **Explore** page.

ii Enter a name for the bot and then click **Create & edit**.

Note:

- *Actions are grouped into packages based on the technology they automate. For example, the Excel advanced package contains Excel-related actions, which you can use to automate operations on a spreadsheet.*
- *When you hover the mouse over the package, you will notice that a pop-up displays context-sensitive information. You can watch a quick video about the package by clicking the Tutorial icon. Please note that tutorial videos are available for the Email, Excel advanced, and Recorder packages with the Automation 360 v.29 release.*
- *You can also access real-time documentation related to the action package or an action. To do so, click the Documentation icon. This will open the in-app Help Center widget, which displays related documentation.*



b. Structure the task bot.

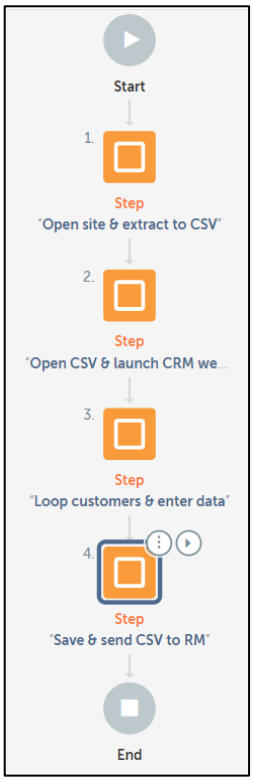
i Search for the **Step** action in the Actions palette and drag and drop the **Step** action to the canvas.

ii Enter an appropriate title for the step, in the Action details pane.

iii Click **Save**.

***Note**: You can save the bot or continue to work on the next action and save the changes at the end.*

iv Repeat steps **i** to **iii** to add the remaining three steps that the bot must perform.



Congratulations! You have now successfully structured the task bot.

3. Step 1: Extract data from a web portal into a CSV file

a. Launch the IT Bricks holiday packages website.

   i Search for the **Browser** package in the Actions palette and drag and drop the **Open** action to the first step.

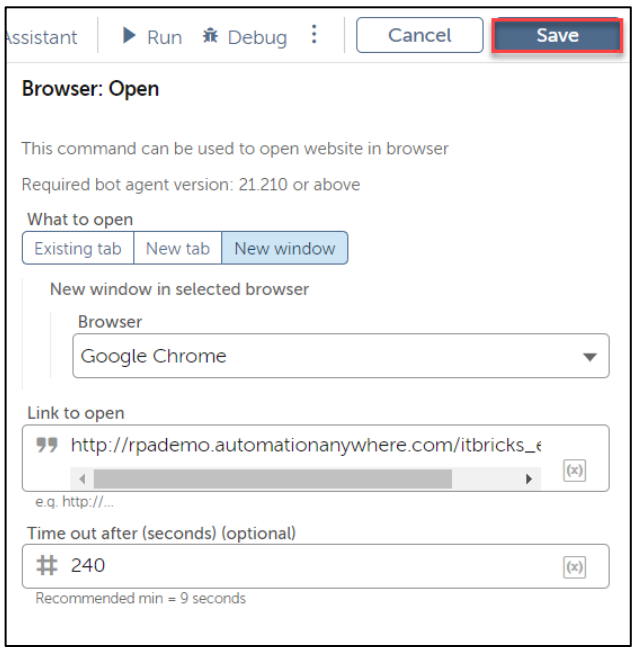
   ***Note**: Most of the actions in the Browser package are designed to work with Google Chrome. Some of the actions such as the **Browser: Close** action will not work for other browsers.*

   ii Click **New window** under **What to open** field.

iii Select **Google Chrome** from the drop-down list in the **Browser** field in the Action details pane.

iv Enter the URL of the web portal (http://rpademo.automationanywhere.com/itbricks_enroll.php) in the **Link to open** field.

v Click **Save**.



vi Run the bot. The **IT Bricks - Holiday Customer Report** window will open in Google Chrome.

***Note**: You can run the bot up to the steps you have created. Although it is a good practice to click save at regular intervals to preserve your progress, running the bot also saves your progress up till that point.*

b. Capture the data from the web table.

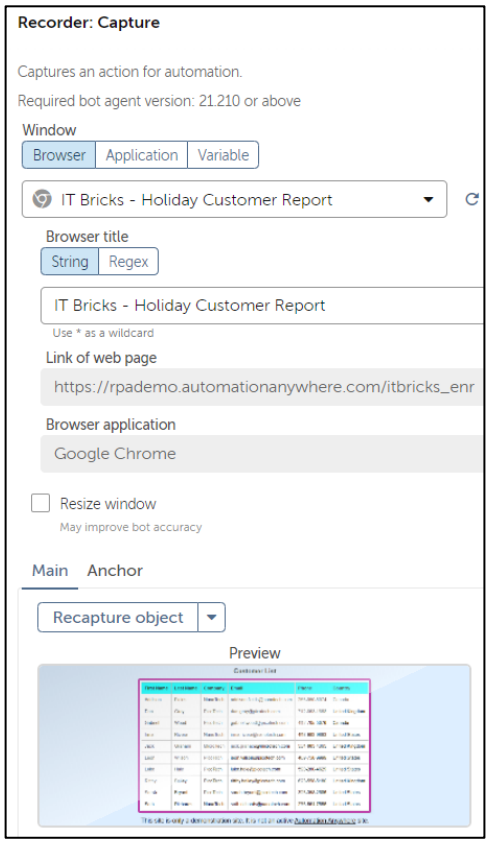
i Search for the **Recorder** package in the Actions palette and drag and drop the **Capture** action at the end of the first step.

ii Click the **Application** toggle button and from the drop-down list, select the **IT Bricks – Holiday Customer Report** window in the Window section of the Action details pane.

***Note**: You must click the **Refresh windows** icon to populate the drop-down list.*

iii Click **Capture object**.

iv Navigate to the web portal, hover your mouse over the table until a red outline appears, and then click to capture it.



v Navigate back to the Bot Editor and from the **Action to take on object** drop-down list in the Action details pane, select the **Get table** action.

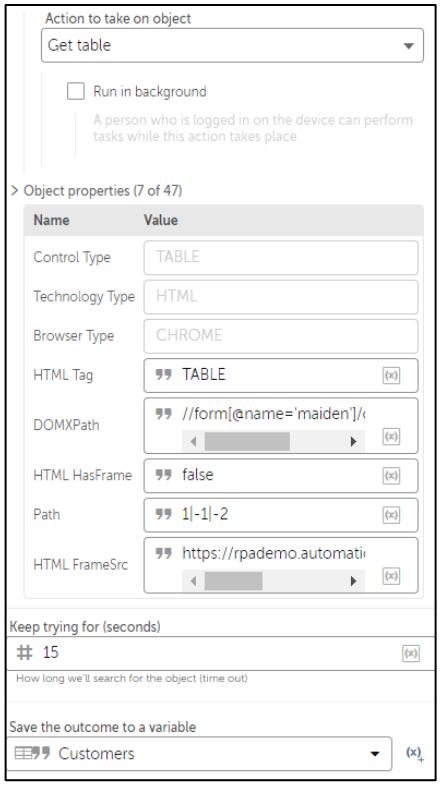
vi Click the **Variables** pane, and then click the **Create variable** icon to create a table variable.

Note: *A variable is a symbol or a character that can hold a specific type of data temporarily.*

vii Select the variable type as **Table** and enter the variable name as **Customers**, and then click **Create**, in the **Create variable** pop-up.

viii Select **Customers** from the drop-down list in the **Save the outcome to a variable** field of the Capture action.

Note*: We will be using the* ***Customers*** *Table variable to capture data from a webpage and to retrieve multiple cells from Excel. To enable this variable to be reused, be sure to define the variable as a Table variable using the Variables pane.*



c. Write the captured table to a CSV file.

i Search for the **Data Table** package in the Actions palette and drag and drop the **Write to file** action at the end of the first step.

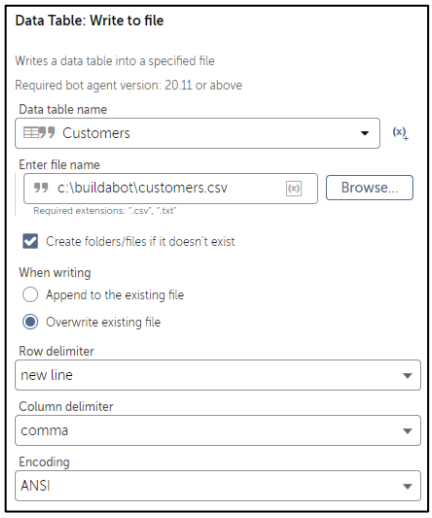
ii Select the variable to which you assigned the captured table (the variable will be **'Customers'** - if you named the variable as per the step **vii** above) from the Data table name field in the Action details pane.

iii Enter the file location of the CSV file in the **Enter file name** field.

iv Check the **Create folders/files if it doesn't exist** checkbox and then click the **Overwrite existing file** option.

v Select **ANSI** as the encoding option from the Encoding list.

***Note**: Select the encoding option as per the encoding scheme of your system.*



d. Close the web portal window.

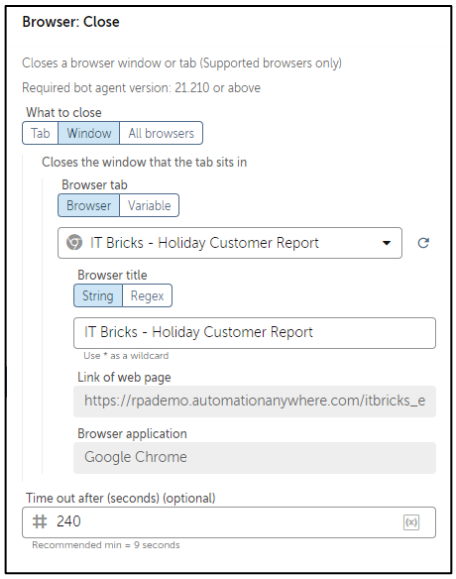
i Search for the **Browser** package in the Actions palette and drag and drop the **Close** action at the end of the first step.

ii Select the **Window** toggle button in the Action details pane, then the **Browser** toggle button, and then select the **IT Bricks – Holiday Customer Report** window.

***Note**: You must click the **Refresh windows** icon to populate the drop-down list.*

iii Run the bot.

***Note**: This ensures that the CSV file is created and available at the specified location.*



Great! You have completed the first step.

4. Step 2: Open the CSV file and launch the CRM

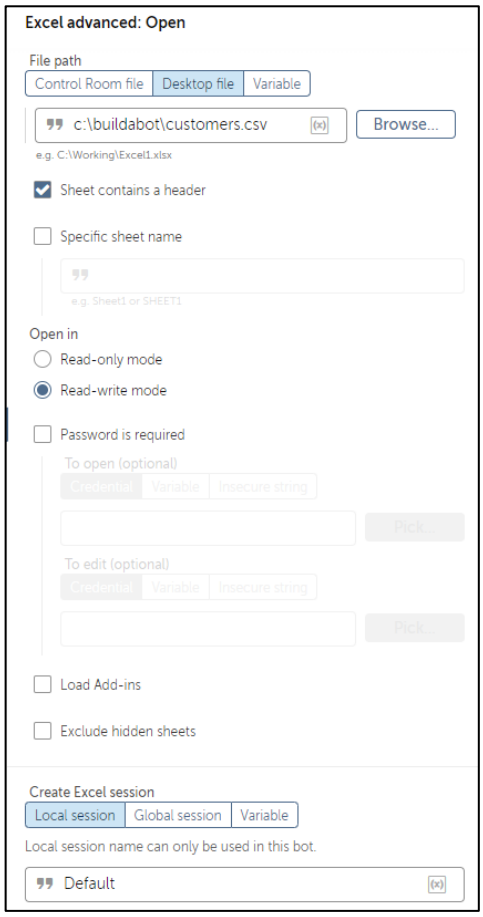
a. Open the CSV file.

i Search for the **Excel advanced** package in the Actions palette and drag and drop the **Open** action to the second step.

ii Select the **Desktop file** toggle button in the Action details pane and enter the file path with name and file extension.

iii Check the **Sheet contains a header** checkbox and then select the **Read-write** mode radio button.

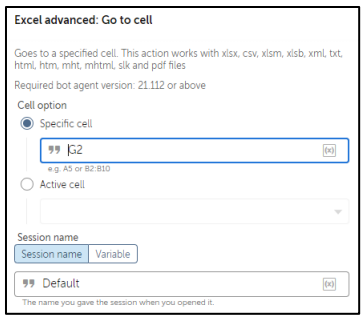
iv Select **Local session** under **Create Excel session** and enter the session name as Default. Click **Save**.



b. Position the cursor in the required cell to update the status.

   i Search for the **Excel advanced** package in the Actions palette and drag and drop the **Go to cell** action at the end of the second step.

   ii Select the **Specific cell** option in the **Cell option** section of the Action details pane and enter the cell address as **G2**.

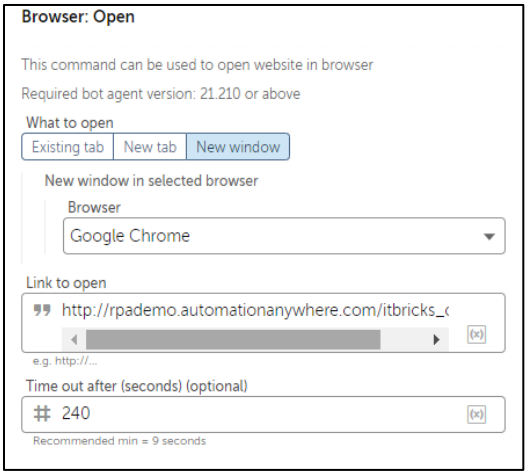


c. Launch the IT Bricks CRM web page.

   i Search for the **Browser** package in the Actions palette and drag and drop the **Open** action to the second step.

   ii Select the **New window** toggle button in the Action details pane and select **Google Chrome** from the **Browser** drop-down list.

   iii Enter the URL of the web portal (http://rpademo.automationanywhere.com/itbricks_crm.php) in the **Link to open** field. Execute the step to open the CRM webpage and then save the bot.



Now, you have added the steps to open the CSV file and launch the CRM website.

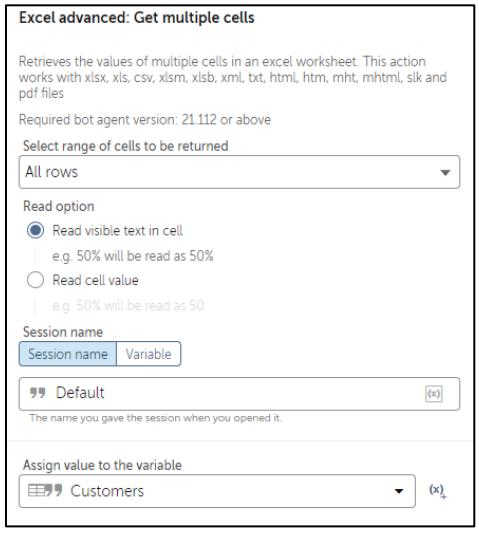
5. Step 3: Populate the CRM webform

a. Retrieve data from the CSV file.

   i Search for the **Excel advanced** package in the Actions palette and drag and drop the **Get multiple cells** action to the third step.

ii Select **All rows** in the **Select range of cells to be returned** drop-down list in the Action details pane.

iii Select the same variable **Customers** to which you assigned the output in the **Assign value to the variable** drop-down list.



b. Loop through the rows of the CSV file and assign each row to a variable.

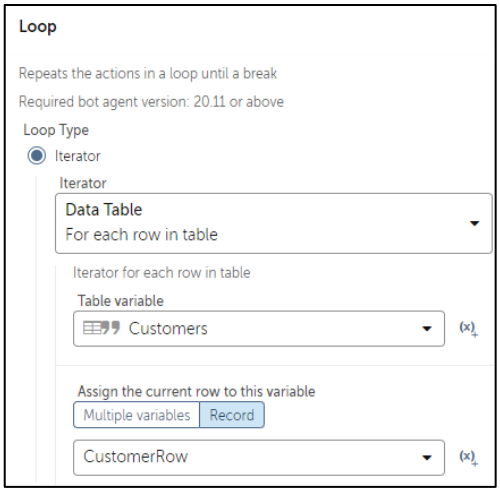
i Search for the **Loop** action in the Actions palette and drag and drop the Loop action at the end of the third step in the Actions palette.

ii Select the loop type as **For each row in table** under **Data Table** in the Action details pane.

iii Select the same table variable (Customers) used earlier in the **Table variable** list.

iv Click the **Create variable** icon to create the record type variable in the **Assign the current row to this variable** field.

v Enter the variable name as **CustomerRow** and click **Create & select**.



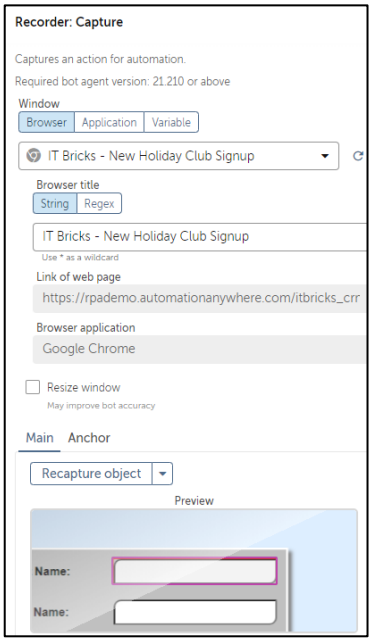
c. Update each field in the CRM webform with the data from the CSV file.

i Search for the **Recorder** package in the Actions palette and drag and drop the **Capture** action within the Loop action.

ii Click the **Application** toggle button in the **Window** section of the Action details pane and from the drop-down list, select the **IT Bricks - New Holiday Club Signup** window.

iii Click the **Capture object** button.

iv Navigate to the CRM web page and capture the **First Name** field.

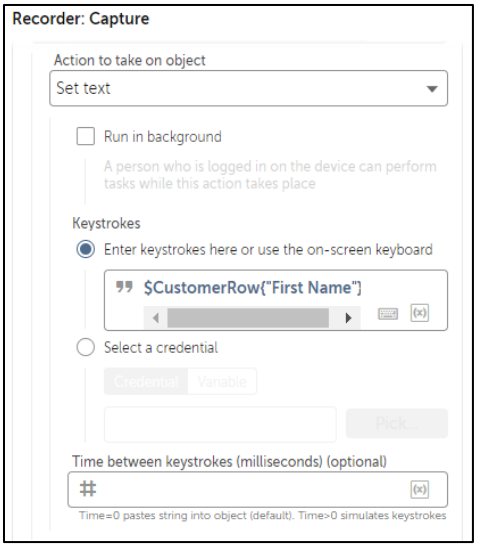


v Navigate back to the Control Room and from the **Action to take on object** drop-down list, select **Set text**.

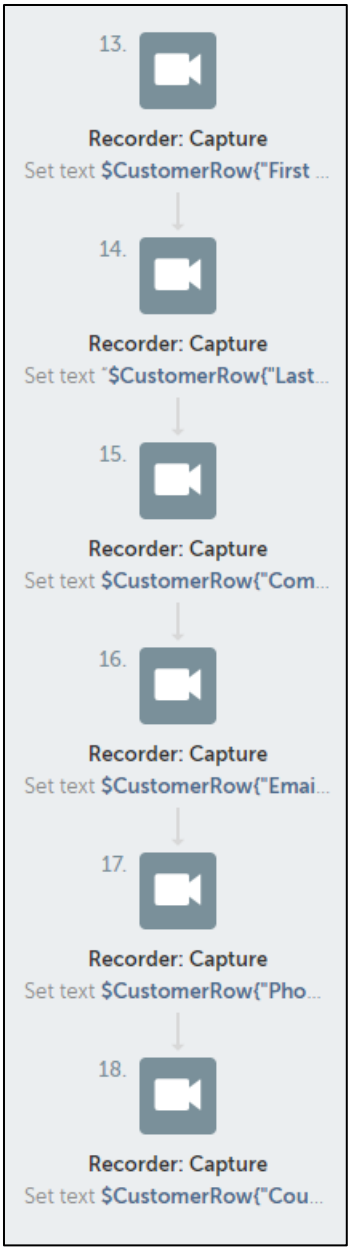
vi Use the **Insert a value** icon to select the record variable (CustomerRow) in the **Keystrokes** section, then select the **By name** toggle button and then enter **First Name** in the text box.

***Note**: It is a good practice to copy the column header names such as First Name, Last Name etc. from the CSV file. This will help eliminate any potential errors that may occur while typing.*

vii Click **Yes, insert**.



viii Repeat steps **i** to **vii** for each field in the CSV file.



d. Capture the Register button and the message that indicates whether the registration was successful or not.

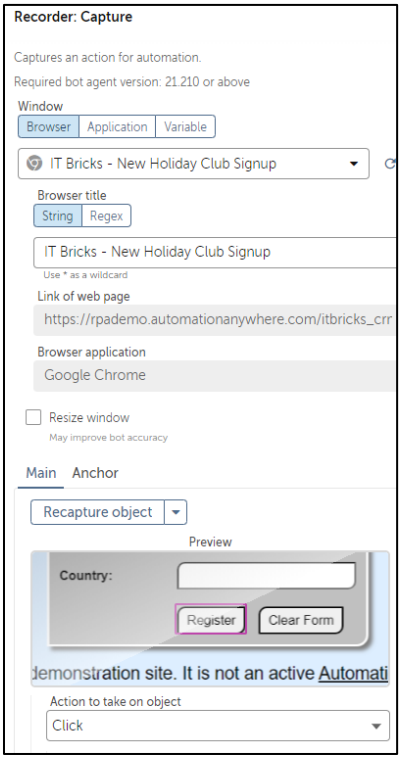
   i Search for the **Recorder** package in the Actions palette and drag and drop the **Capture** action within the Loop action.

   ii Click the **Application** toggle button in the Window section of the Action details pane and from the drop-down list, select the **IT Bricks - New Holiday Club Signup** window.

iii Click the **Capture object** button.

iv Navigate to the CRM web page and capture the **Register** button.

Navigate back to the Bot Editor and from the **Action to take on object** drop-down list, select **Click**.



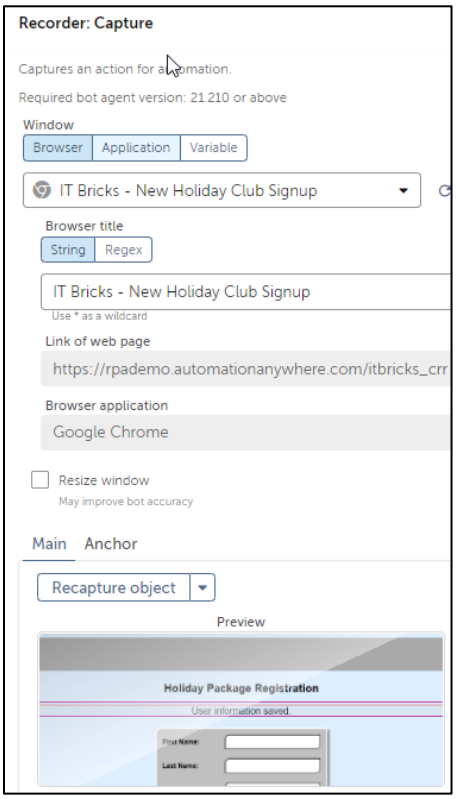
v Search for the **Recorder** package in the Actions palette and drag and drop the **Capture** action within the Loop action.

vi Click the **Application** toggle button in the Window section of the Action details pane and from the drop-down list, select the **IT Bricks - New Holiday Club Signup** window.

***Note**: You will need to enter all the details of one customer manually and then click register so that the message to be captured is displayed.*

vii Click the **Capture object** button.

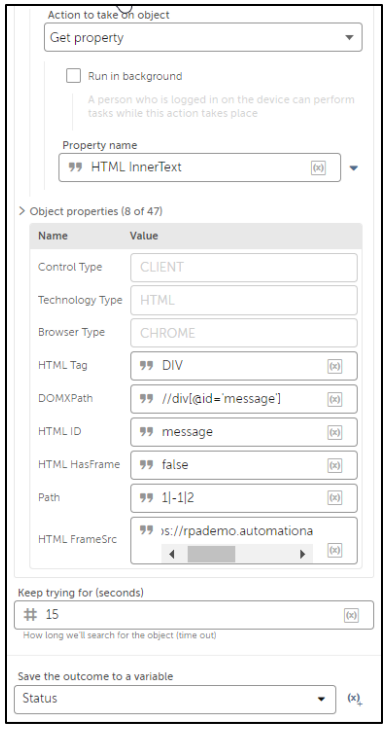
viii Navigate to the CRM web page and capture the message at the top of the page that says, 'User information saved'.



ix Navigate back to the Bot Editor and from the **Action to take on object** drop-down list, select the **Get property** action.

x Select **HTML InnerText** from the drop down in the **Property name** field.

xi Click **Create variable** icon to create a **Status** variable of type String in the **Save the outcome to a variable** field and click **Create & select**.

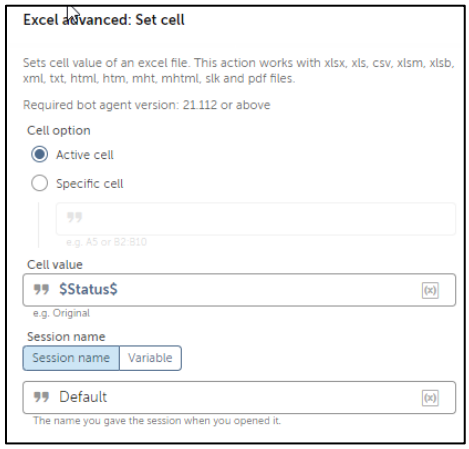


e. Update the status in the CSV file and move the cursor one cell below.

i Search for the **Excel advanced** package in the Actions palette and drag and drop the **Set cell** after the last Recorder action within the loop.

ii Click **Active cell** in the **Cell option** section and in the Cell value list, use the **Insert a value** icon to select the status variable.

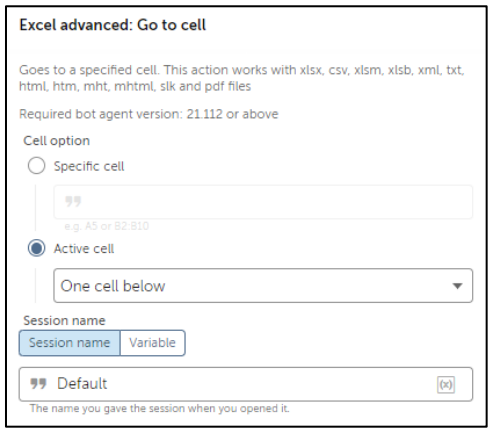
iii Click **Yes, insert**.



iv Search for the **Excel advanced** package in the Actions palette and drag and drop the **Go to cell** action at the end of the loop.

v Select the **Active cell** radio button and from the drop-down list, select **One cell below**.

vi Click **Save**.



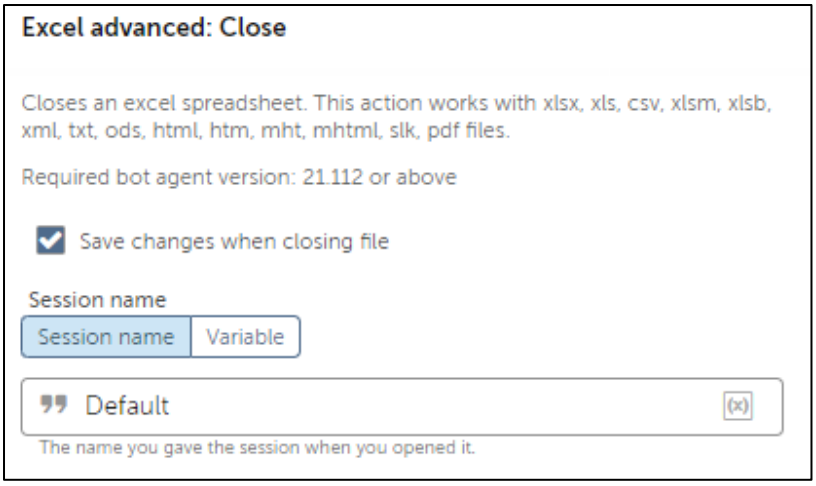
Congratulations! You have now completed the third step and populated all the customer details in the CRM webform.

6. Step 4: Save and send the CSV file to the Relationship Manager

a. Close the CSV file.

i Search for the **Excel advanced** package in the Actions palette and drag and drop the **Close** action to the fourth step.

***Note**: Ensure that the **Save changes when closing file** check box is selected.*



b. Send an email to the Relationship Manager.

   i Search for the **Email** package in the Actions palette and drag and drop the **Send** action at the end of the fourth step.

   ii Enter the Relationship Manager's email ID in the **To address** field of the Action details pane.

   iii Update the Email subject in the **Subject** field.

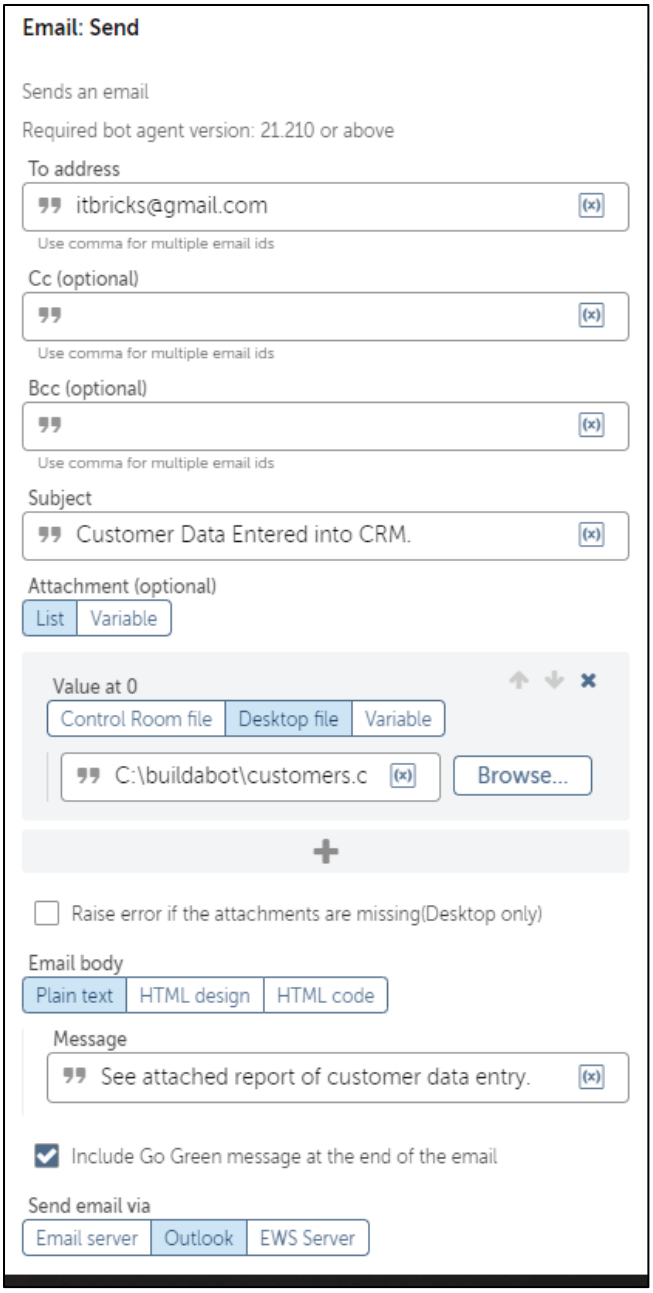
   iv Select the **List** tab and then click the **+** sign and then click **Desktop file** toggle button in the **Attachment (optional)** section. Then, enter the file path and name of the CSV file.

   v Enter the suitable message to be included in the body of the email in the **Message** field.

   ***Note**: You may also add rich text formatting to your message using the HTML design option. Upon selecting the **HTML design** tab, you are presented with an editor that enables you to apply formatting elements such as font selection, font size, bold, underline, italics, font color, and text hyperlinks.*

   vi Select the application for sending the email in the **Send email via** list.

   vii Click **Save**.



Great! Your bot is now ready!

7. Run the task bot

a. Close the open Excel workbook.

***Note**: Ensure that there are no indications of incomplete actions.*

b. Click **Run** in the Bot Editor toolbar.

Congratulations! You have now successfully created the bot that would extract data from a web portal, capture it in an excel sheet, populate all the customer details in the CRM webform, and also notify the email recipients.

Go be great.™