

PUBLIC

RPA As Easy As 1-2-3: Low-Code Design for Microsoft Office and SAP Software

INT165

Exercise 1: Starting with Excel

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INTRODUCTION

This workshop aims to introduce the new features available in SAP Intelligent RPA 2.0 and how they can be used to simplify the business integration with Microsoft office and with SAP tools.

In this workflow, you will create process on Excel.

[Note: We are expecting that you have created a trial account.]

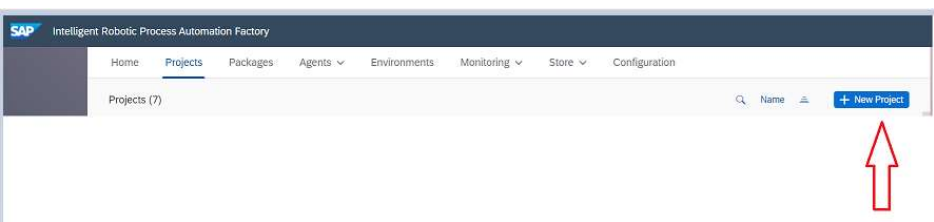
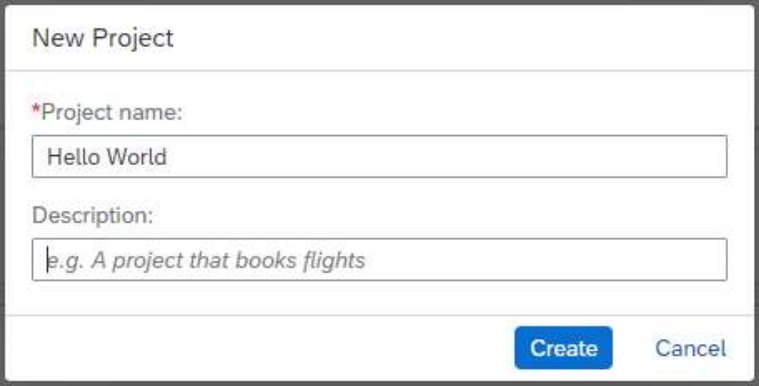
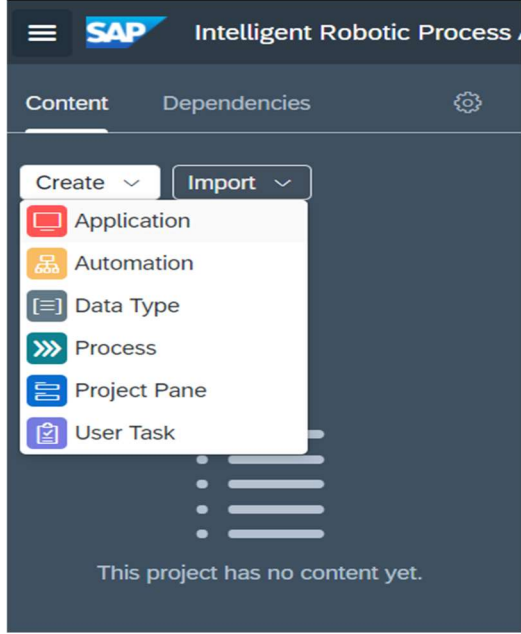
EXERCICE 1: CREATE BOT ON EXCEL

Estimated time: 30 minutes

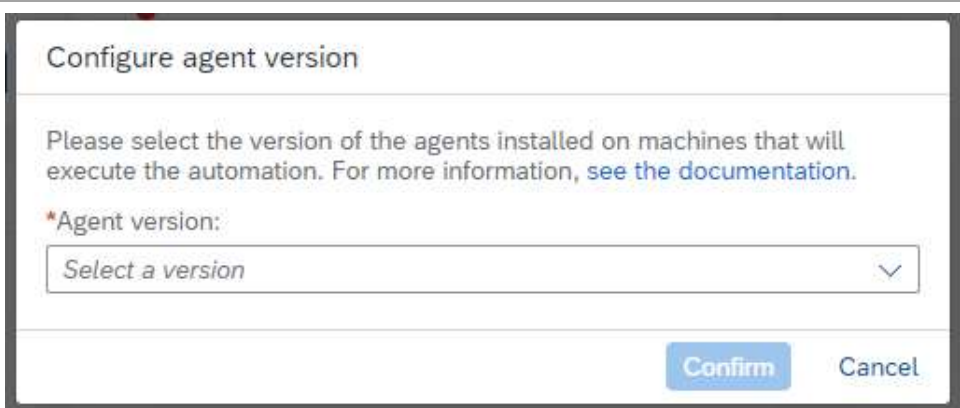
The aim of this exercise is to create a simple automation using the Excel library. You will see how to create a simple automation which:

- ... creates an Excel file
- ... inserts text in a cell of the created Excel file

Creation of the automation

Explanation	Screenshot
Go to Projects Tab. Click on New Project	 The screenshot shows the SAP Intelligent Robotic Process Automation Factory interface. The 'Projects' tab is selected in the top navigation bar. Below the navigation bar, there is a search bar and a '+ New Project' button. A red arrow points to the '+ New Project' button.
A new popup appears. Choose a name for the project (here HelloWorld), then click on the Create button.	 The screenshot shows a 'New Project' popup form. It has two input fields: 'Project name' with the value 'Hello World' and 'Description' with the value 'p.g. A project that books flights'. At the bottom right, there are two buttons: 'Create' (highlighted) and 'Cancel'.
Click on the Create button to expand the dropdown menu, then select Automation.	 The screenshot shows the 'Create' dropdown menu expanded in the 'New Project' popup. The menu lists several options: Application, Automation (selected), Data Type, Process, Project Pane, and User Task. The 'Automation' option is highlighted with a blue background.

In the pop-up dialog, select the **agent version** for this project.
In this exercise, the version can be the one marked with the label **Local**.
Click on Confirm.



Configure agent version

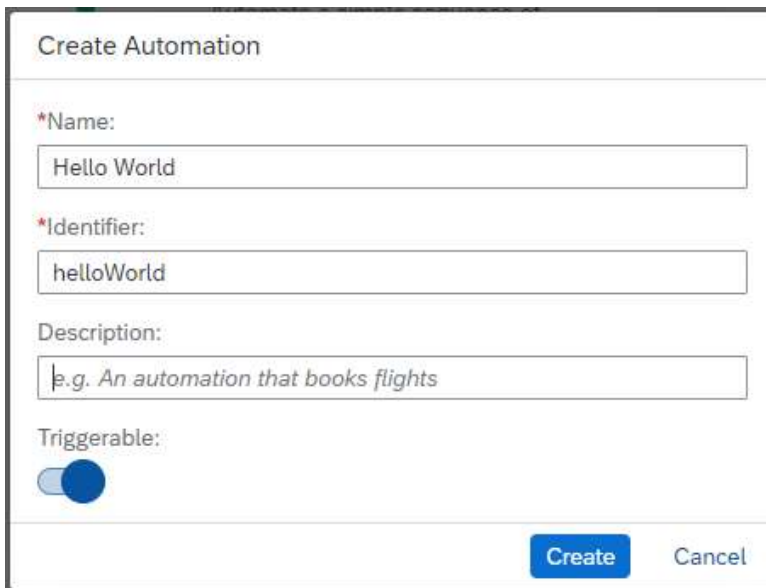
Please select the version of the agents installed on machines that will execute the automation. For more information, [see the documentation](#).

*Agent version:

Select a version

Confirm Cancel

A new popup appears. **Choose a name** for the automation (here HelloWorld), then **click** on the Create button.



Create Automation

*Name:

Hello World

*Identifier:

helloWorld

Description:

e.g. An automation that books flights

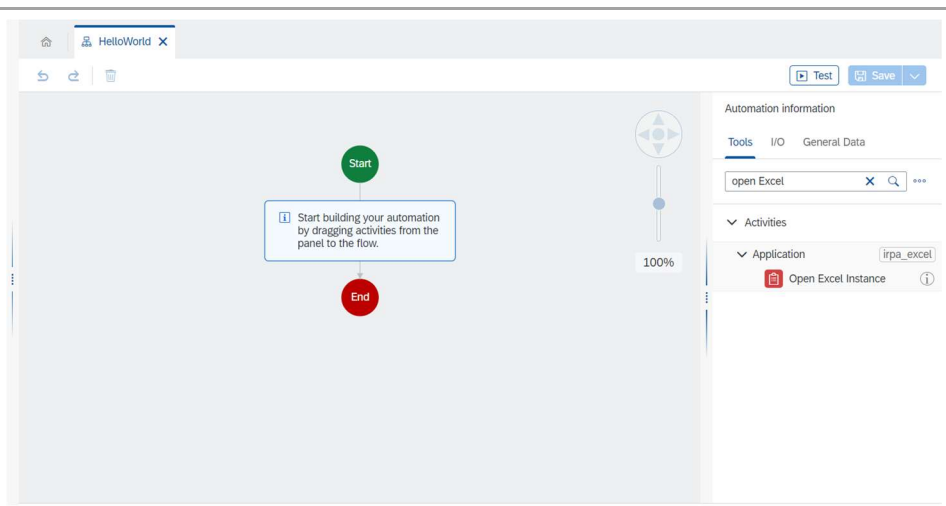
Triggerable:

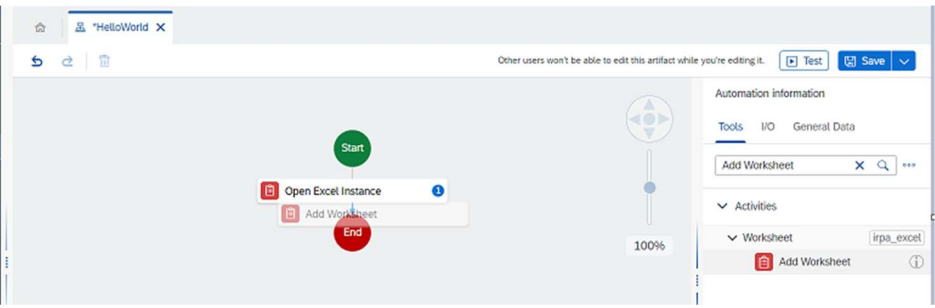
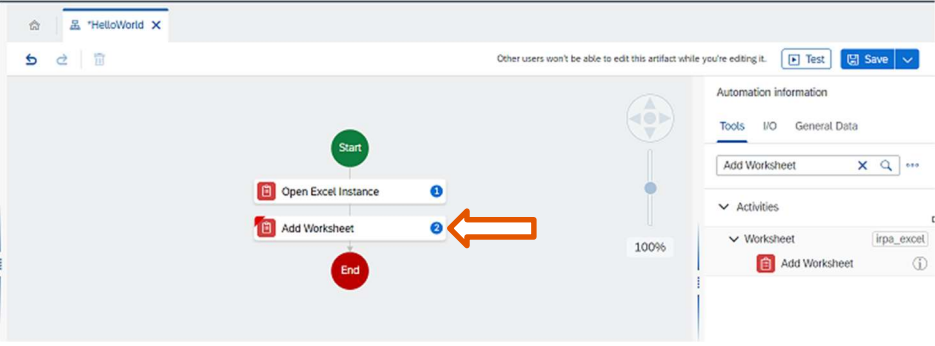
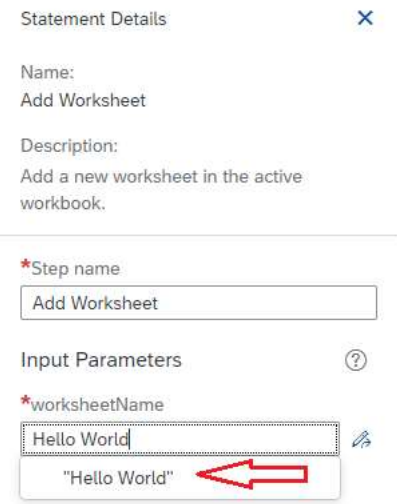
☒

Create Cancel

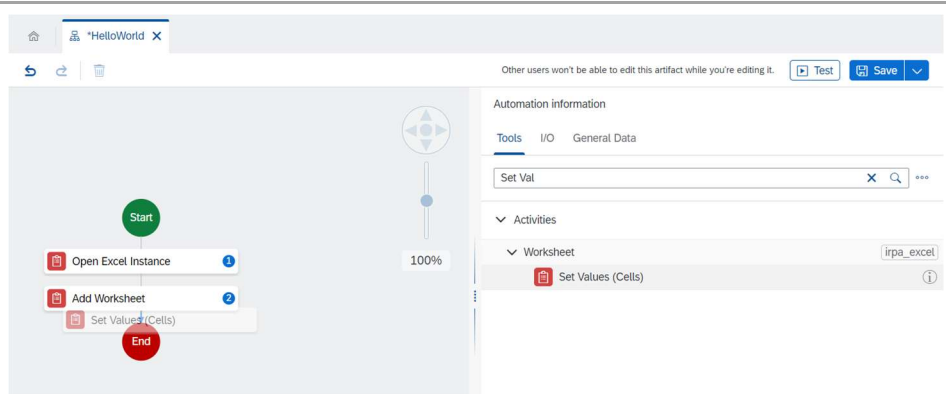
Adding Excel Activities

Search for “open excel” in the search bar of the right-hand side panel. **Drag & drop** the Open Excel Instance activity from the Tools panel into the workflow, between the green and red circle.

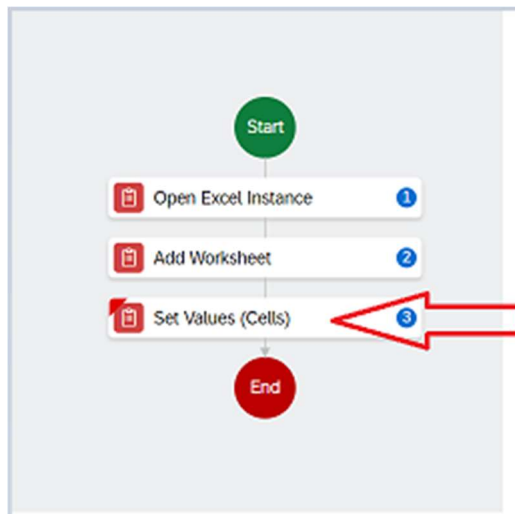


<p>Now search for “add worksheet” in the search bar on the right side. Drag & drop the Add Worksheet activity to the workflow, between the green Start and red End node.</p>	
<p>You will notice a small red triangle in the corner of the activity. It indicates that something is missing. Let’s fix that.</p> <p>Click on the Add Worksheet activity to open the Statement Details panel on the right.</p>	
<p>Choose a name for the Excel sheet in the field labeled worksheetName. For our demo, let's go with the title <i>Hello World</i>.</p>	

Click on the grey canvas to deselect the Statement Details panel and see the Activities panel again. From there, search for “set values” and **drag & drop** the Set Values activity onto the canvas, below the Add Worksheet activity.

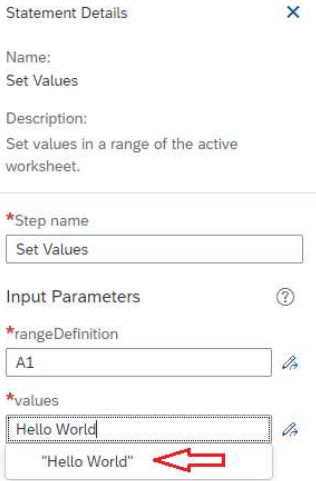
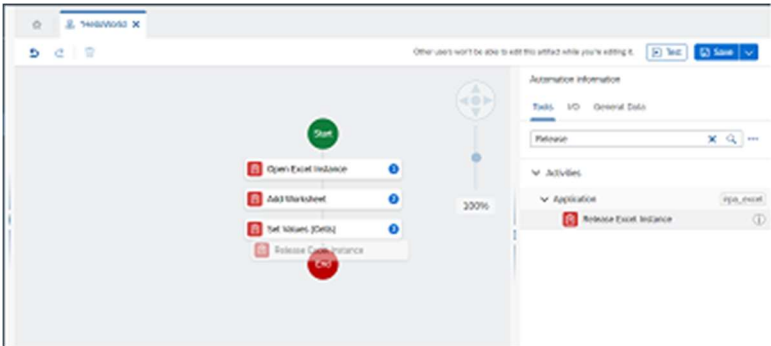


Click on the Set Values activity to open the Statement Details panel on the right.



In the rangeDefinition field, you can now **choose** a cell where you want to set your input. Here A1 is chosen.

The 'Statement Details' panel for the 'Set Values' activity is shown. It includes fields for 'Name' (Set Values) and 'Description' (Set values in a range of the active worksheet). The 'Step name' field is set to 'Set Values'. Under 'Input Parameters', the 'rangeDefinition' field is set to 'A1', which is highlighted by a red arrow. Below the input field, a list shows the selected cell 'A1' with a red arrow pointing to it.

<p>In the values field, enter a string which you want to insert into the cell in the Excel file.</p> <p>For the purpose of this demo, we will enter <i>Hello World</i>.</p>	
<p>Finally, click on the canvas again to get back your Activities panel and search “release” to find one last activity. Drag & drop the <i>Release Excel Instance</i> activity onto your automation, below the <i>Set Values</i> activity.</p>	

Test your project

Explanation	Screenshot
<p>Once everything is done, click on the Save button on the top right of the screen.</p>	
<p>Now click on the Test button to launch the automation.</p>	

Select the Environment you have previously created.

Test Automation

*Environment:

Select an environment

Test

Cancel

After a few seconds of loading, an Excel file will open which will show the *Hello World* string set in the cell A1.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Hello World												
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													
13													
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24													

Run your project

Explanation	Screenshot
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<ul style="list-style-type: none">Go to your project.Click on the Home button of the projectCheck that the conditions to generate a Package are fulfilled (i.e. All values for error and warning are set to 0)Click on the Generate Package button on the right A dialog will open, again click on Generate Package Close the Project navigator tab	<div><h3>Generate Package</h3><div><div><div>*Name:</div><div>TechED Excel Demd</div></div><div><div>Description:</div><div>Enter Package Description</div></div><div><div>Version Number:</div><div>1.0.0</div></div></div><div><div>Generate Package</div><div>Cancel</div></div></div>
<p>Locate the generated package in the Packages tab.</p> <p>Click on Add Trigger to create a scheduled trigger:</p> <ul style="list-style-type: none">In “Select an Environment”, select the Environment you have previously createdIn “Select a trigger type”, chose Scheduled trigger	<div><div>HomeProjectsPackagesAgents ▾Environme</div><div><div>Packages (1)</div><div><div>TechED Excel Demo from</div><div>Version 1.0.0 <small>BETA</small><div>Preview</div></div></div></div><div><div>Create Trigger</div><div><div>1 Select an environment.</div><div>2 Deploy</div><div>3 Select a trigger type</div></div><div><div>TechED</div><div><div>TechED Demo Environment</div><div>Test</div><div>Updated 10 minutes ago.</div></div><div><div>Author</div><div>SU</div></div></div></div></div>

1

Select an environment.

2

Deploy

3

Select a trigger type

TechED Excel Demo

Version 1.0.0

⌵

API

☐

A trigger of type API opens a dedicated endpoint that allows an external application to execute a scenario or a process.

👤

Attended

☐

With an attended trigger, the deployed package is distributed to a specific group of agents, and users run the jobs manually.

🕒

Scheduled

☒

With a scheduled trigger, the user does not need to start a job manually. Jobs are created according to the schedule you define in the trigger.

Previous

Next

Cancel

⌵

Add Scheduled Trigger

*Execute:

Excellerate

✕

▼

*Priority:

Low

▼

Schedule

Input Parameter

*Date range:

Aug 27, 2020

📅

Sep 3, 2020

✕

📅

*Timezone:

(UTC+01:00) Brussels, Copenhagen, Madrid, Paris

✕

▼

*Recurrence:

—

5

+

Minutes

▼

*Jobs expire after:

—

60

+

Minutes

▼

New job:

☒

A new job will be added no matter what happens.

Midnight (AM)

Noon (PM)

12

1

2

3

4

5

6

7

8

9

10

11

12

1

2

3

4

5

6

7

8

9

10

11

12

Sunday

Monday

Tuesday

Wednesday

Thursday

Create

Cancel

•

For Execute, select from dropdown your automation to execute

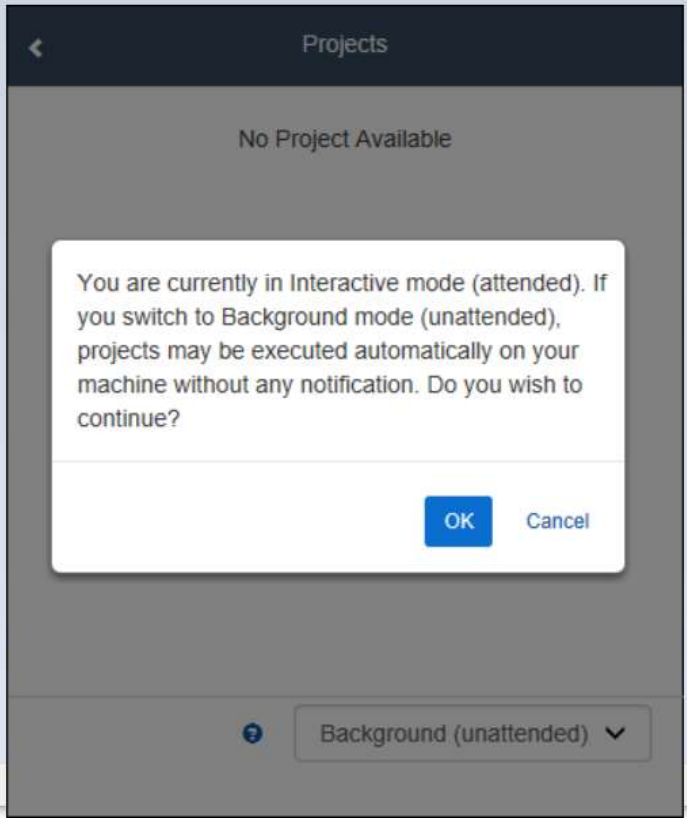
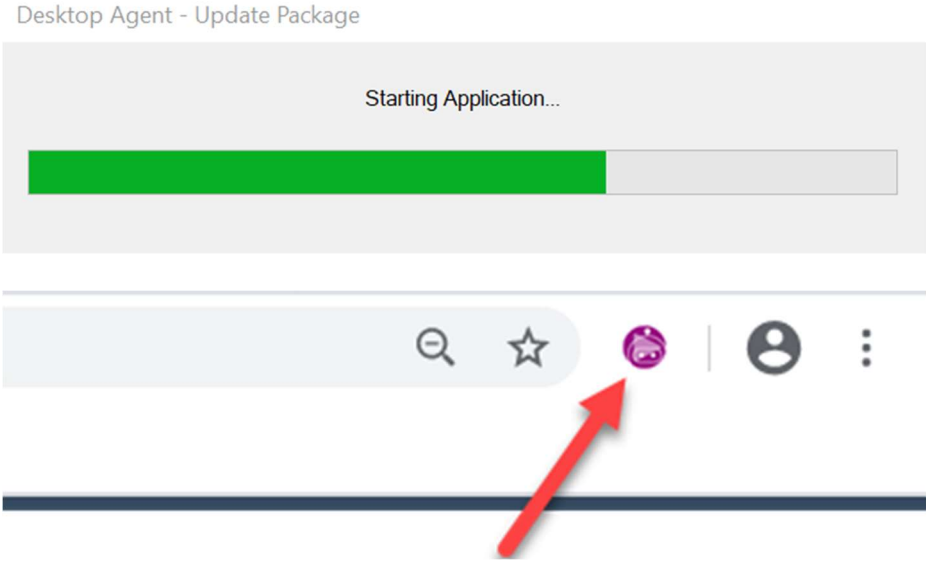
•

Select **Date Range** from yesterday until tomorrow and some Time period including today

•

Click **Create**

11

<ul style="list-style-type: none">Start Desktop Agent (You will see a popup which indicates that the package is downloading)From the Factory, check in Agents/Agents table the default mode is Attended by default.From the systray, click on projects, then select 'Background (unattended)' and click on OK.	
<p>Execute unattended process</p> <p>Wait until job gets distributed and scenario gets executed successfully (3 – 5 min)</p> <p>You will observe in the systray that the desktop agent becomes active.</p>	

CONCLUSION

You have completed the exercise!

You are now able to:

- create an automation using the Cloud Studio
- use automations to manipulate Excel sheets
- test and run your project

REFERENCES

Help portal for SAP Intelligent Robotic Process Automation: <https://help.sap.com/viewer/p/IRPA>

SAP Intelligent Robotic Process Automation on SAP Community:

<https://community.sap.com/topics/intelligent-rpa>

www.sap.com/contactsap

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