Lab 10. Deploying and Maintaining the Bot



On completion of an automation project design, we make use of the

Orchestrator to manage our bots. Before that, we publish our workflow first using the publish utility. Once we publish the project, the package is uploaded to the server. Then we use Orchestrator to manage any number of bots for any number of tasks. The Orchestrator Server also provides the facility for scheduling bots and specifying the time intervals that they work in according to the user's needs.

To understand more, let's see an overview of the topics to be covered in this lab:

- Publishing using publish utility
- Overview of Orchestration Server
- Using Orchestration Server to control bots
- Using Orchestration Server to deploy bots
- License management
- Publishing and managing updates

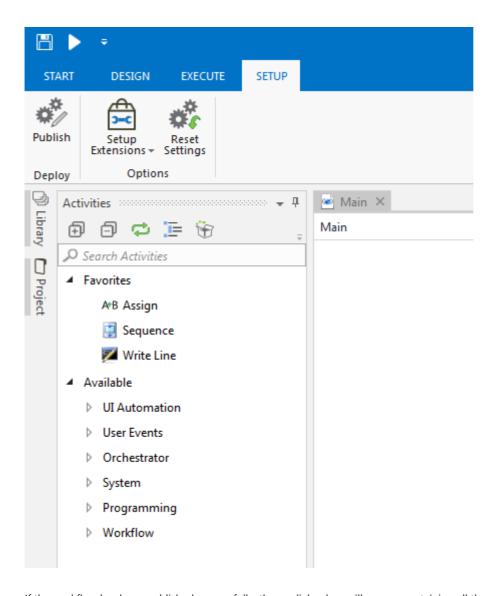
Publishing using publish utility

We design a workflow for some functionality so that it reduces our effort and time. When the workflow is successfully completed, we cannot afford to open UiPath time and again to run our workflow. So to use a workflow directly from the UiPath Robot, we have to publish our workflow first and then schedule it through Orchestrator. As soon as our workflow is published, we can directly run our workflow using a UiPath Robot from Orchestrator.

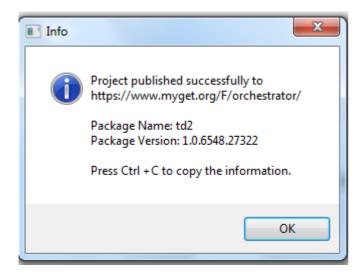
How to publish a workflow in UiPath

The following are the steps to be followed to publish a workflow in UiPath:

- 1. First, open UiPath Studio, create a new project, and give it an appropriate name.
- 2. Go to the **SETUP** Ribbon and click on the **Publish** button. Now check whether the project has been published successfully or not:



If the workflow has been published successfully, then a dialog box will appear containing all the necessary data required to run that workflow from Orchestrator:

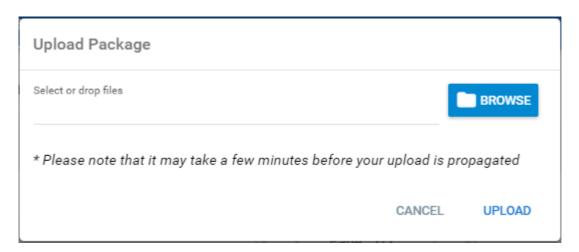


The Info``dialog box displays all the information as mentioned in the following list:

- 1. The URL of the Orchestrator where the project is published.
- 2. The name of the package that has been published by you from UiPath Studio.
- 3. The version of the package that is published to Orchestrator. When we create any project in UiPath Studio then by default the path is saved in C:\Users\username\Documents\UiPath or it can be changed manually by the user. On creating a project, a folder is created that contains the following types of file:
 - The .screenshot folder
 - The .xaml file that is automatically created during automation
 - project.json; this project file holds information about the project

When we publish the package to Orchestrator Server then it automatically reaches the server and can be viewed on the Packages page. However, if somehow the package is not found on the Orchestrator Server then we can add a package manually as well, as shown in the following steps:

1. Click on the Upload Package option:



- 2. Click on **BROWSE** and navigate to the location to which your package was published in the first step.
- 3. Click on UPLOAD .
- 4. Now search for your package by clicking on **Processes** and then typing your package name in the empty Search box on the **Packages** page.

Writing/editing the published package info into the .json file

The .json file can be found inside the project. To edit the .json file in the project, we should follow the given steps:

- 1. Go to the project directory
- 2. Open the .json file in any editor, such as Notepad++
- 3. Now edit the main parameter of the automation project that you want to execute when the Orchestrator starts:

```
File Edit Format View Help

{

"name": "13",
"description": "Blank Project",
"main": "Main.xaml",
"dependencies": {

"UiPath.Core.Activities": "17.1.6522.14190"
},
"excludedData": [
"Private:*",
"*password*"
],
"toolVersion": "17.1.6522.14204",
"projectVersion": "1.0.6528.35408",
"packOptions": {},
"runtimeOptions": {}
}
```

- 4. Now save the .json file
- 5. Go to Orchestrator's Processes page and click on the Packages button

Overview of Orchestration Server

Using of Robots was not as popular as it is now. In other words, we can say that Robots worked within a limited environment. But today, due to **Robotic Process Automation** (**RPA**), Robots can work in different environments. Nowadays, their performance is not limited. They are now playing a big role in terms of automation, working as assistant bots to fully potential Robots. They can work 24/7 and their operations can be managed and scheduled through the Orchestrator Server. UiPath Orchestrator is a web server that provides you with an environment for maintaining and scheduling your bots. Orchestrator is a highly accessible web server platform for fast deployment from one Robot to many Robots.

In autonomous automation techniques, one Robot can automate another Robot. This means a Robot can manage all the activities of another Robot-like process; scheduling, and so on.

Robots are of two types:

- Front office Robot (assistant Robot)
- Back office Robot

- 1. Front office Robot (assistant Robot): Front office Robots act as a helping hand to its user. These are the Robots that require user interactions during the process. A Front office Robot is an agent assistant, which means the user is required to interact with the process. For example, the Robot requires the user to provide credentials or displays some message or dialog to which the user is required to respond otherwise further processes will not work. Some business processes are required to be performed by the trigger activity, in which once a task is triggered, the Robot is capable of running automation processes behind the lock screen.
- 2. **Back office Robot**: Back office Robots can log in to window sessions and run the automated process in unattended mode. They can be started with the help of Orchestrator. We can schedule these Robots or we can also run them manually using UiPath Robot or UiPath Studio.

UiPath Orchestrator has some logical components, which are given as follows:

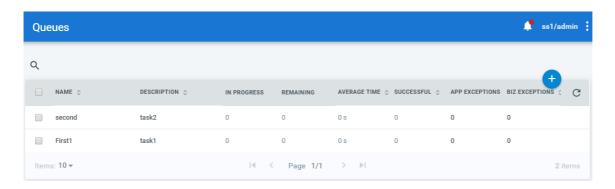
- 1. User Interface Layer:
 - Web Application
- 2. Web Services Layer:
 - Monitoring Service
 - Logging Service
 - o Deployment Service
 - o Configuration Service
 - Queues Service
- 3. Persistence Layer:
 - SQL Server
 - ElasticSearch

Queues

Queues work as a container that stores tasks that need to be implemented. Simply imagine a group of boys standing in a queue in front of a ticketing counter. The logic is that the person who goes in first gets out first. **First In First Out** (**FIFO**).

Similarly, in the case of Robots, when we have a number of operations that are to be performed and when the server is busy, then tasks are moved in a queue and they are implemented on the same logic **First In First Out** (**FIFO**).

To create a new queues, search for the Queue option in the Orchestrator Server listed on the left-hand side and then inside the Queue page, you can add one. It also allows you to access all those **Queues** that have already been created. It contains some information about the task such as the remaining time, progress time, average time, description, and so on, as listed in the following screenshot:

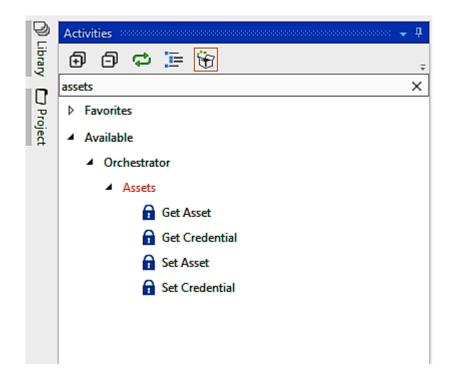


We can also add queue items from UiPath Studio and there are various activities that support this feature, which are listed as follows:

- Add Queue Item: This activity is used to add a new item to the queue in Orchestrator. The status of the
 item will be New.
- Add Transaction Item: This activity is used to add an item to the queue to begin transaction and set the status as In Progress. Here we can add custom reference for each respective transaction.
- **Get Transaction Item**: This activity is used to get an item from the queue to process it and set its status as In Progress.
- **Postpone Transaction Item**: This activity is used to define time parameters between which transaction should be processed. Here, basically, we will specify the time interval after which a process will start.
- **Set Transaction Progress**: Used to assist and create custom progress statuses for In Progress transactions. To notify its progress if the process crashes. This activity plays a significant role in tackling troubleshooting processes.
- Set Transaction Status: Used to modify the status of the transaction item; whether it fails or is successful.

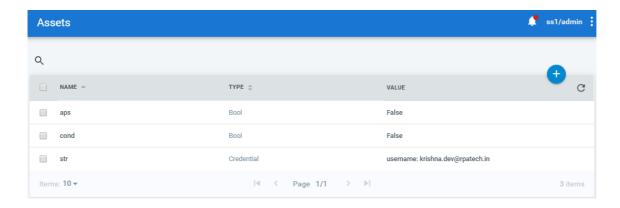
Assets

Assets work as variables or credentials and can be used in distinct automation projects. Assets provides the opportunity to hold specific information. This information can be easily accessed by the Robot. The Assets activity can be found from the Activities panel, as given in the following screenshot:



In addition, assets can also be used for security purposes to store credentials. As we know, all credentials are stored in encrypted format by the AES 256 algorithm. When an RPA developer is designing a process, it can be invoked by the developer, but its value is still hidden.

To create a new asset in Orchestrator, we are required to open the Assets page. It also shows all the previously created assets that can be removed or edited:



Assets are of two types:

- 1. Get Asset
- 2. Get Credential

The **Get Asset** and **Get Credential** activities are used in Studio to request information from Orchestrator about a specific asset, according to a provided AssetName.

The AssetName is required for an already stored asset in the Orchestrator database so that the Robot can access the information stored in Asset. To do so, the Robot needs permission to retrieve information from that particular asset to be used in the automation project. We can get assets using the **Get Asset** activity in the **Activities** panel of UiPath Studio as explained earlier.

There are four types of asset values:

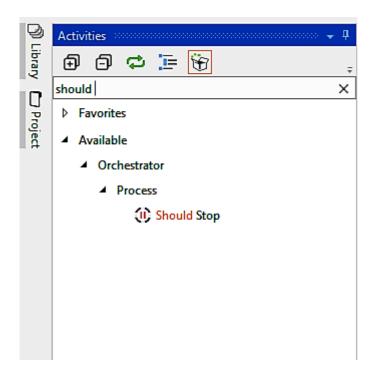
- 1. Text: This holds string values.
- 2. Boolean: This supports only true or false values.
- 3. **Integer**: This stores integer values.
- 4. **Credential**: This holds usernames and passwords that are needed by the Robot to execute specific processes, such as login details.

Furthermore, we also have the following types of Asset:

- Global: This can be accessed and used by all available Robots
- Per Robot: This can be accessed only by a specified Robot

Process

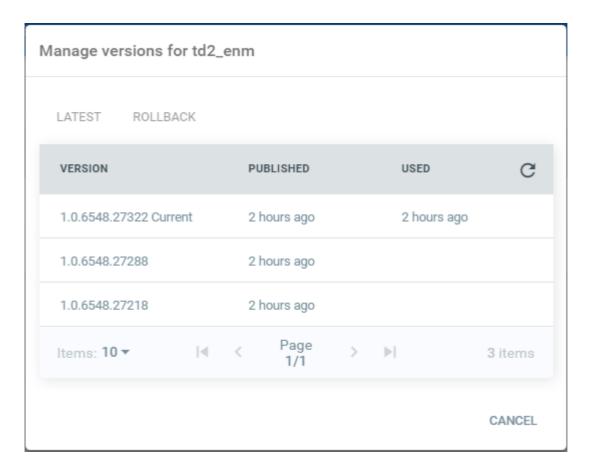
The process is responsible for deploying and uploading the package to the Orchestrator environment, and for deploying already created packages. In UiPath Studio, we can search for Process inside the Orchestrator option available in the Activities panel. It contains a Should Stop activity that can be used to stop a process whenever required:



Processes assist in distributing all Packages over the Robot machine, which makes execution faster. We can assign jobs to these processes from the jobs panel available in the left corner in Orchestrator:



At every stage a package is linked to the environment and it is automatically distributed with each Robot machine that belongs to a particular environment. Whenever you make changes in the package you created earlier and upload those changes, it creates a new version of that package. Thus, in order to update your package, you can go to the Manage versions option available on that package and select the version of that package that you want to use:



If a new update to a certain package is available then an icon is displayed on that package.

When we are using the latest available version of a package with a specific process, then the icon



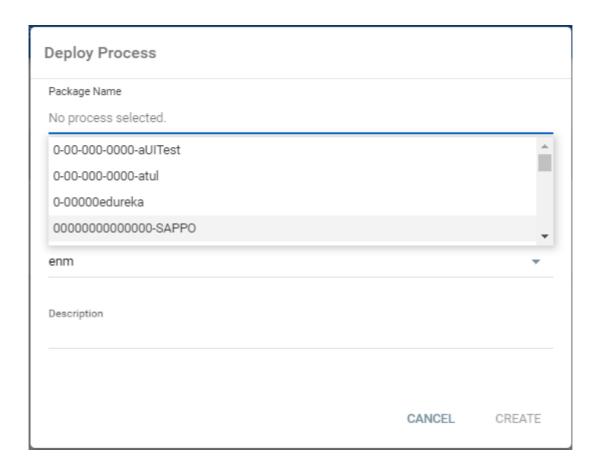
will show next to the process. All activities that we are using in Studio are stored in the NuGet feed that Orchestrator has access to. While we add a new process, the name of the environment should be the same as that of the Robot. This allows the execution of processes using respective Robots.

Deploying a process

Deploying a process basically refers to the distribution of the packages to the Robots available.

After successfully publishing your project from UiPath Studio, as explained earlier, we can follow these following steps to deploy a process:

- 1. Open the Orchestrator web page.
- 2. Click the Processes option on the left side.
- 3. Processes windows will appear on the web page.
- 4. Now click the + button to add a package. The Deploy Process windows will be displayed.
- 5. Now choose the desired package name from the drop-down list (package here corresponds to the project you have published from UiPath Studio).
- 6. Here, the description option is optional.
- 7. Finally, click the **CREATE** button to deploy the process:



Using Orchestration Server to control bots

When it comes to controlling a Robot Orchestrator is the best option. Orchestration Server can be used to schedule bots so that Robots can execute their jobs within the time interval specified on the server. Orchestrator can control an unlimited number of Robots and we can very easily assign various tasks to the Robots as per the user's needs. Also, a specific task can be assigned to multiple Robots. Orchestrator also gives us the facility to maintain all logs generated by the Robot.

Robot statuses

The status of a Robot tells us about its availability and connectivity. We get to know whether the Robot is available, busy, or disconnected. The following are the statuses that a Robot can have:

- **Available**: This status of the Robot shows that the Robot is not working on any other task and is freely available to take tasks
- Busy: This type of status will be shown when a Robot is currently executing some task and is not available
- · Disconnected: This status of Robot shows that your Robot is no longer connected to Orchestrator Server

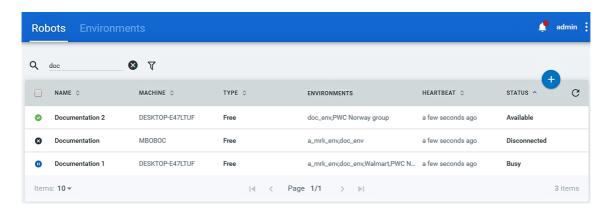
Editing the Robot

Sometimes we may have to edit the Robot in Orchestrator in case the Robot is either not functioning properly or we want to assign some other tasks to the Robot.

To edit the Robot, click on the Edit button from the Edit window and change the name or the necessary fields as given:

Name

- Username
- Password
- Type
- Description:



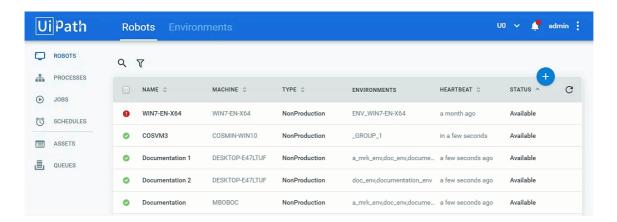
Deleting the Robot

When a Robot is not working at all, it is necessary to remove it, and we can use either of the following:

- To delete the desired Robot, select that Robot and go to the admin screen by clicking on the Admin tag on
 the top of the Orchestrator Server window. Then select the More Action button and delete the Robot.
- If you want to delete one or more Robots from the page, we can select them or remove them from the page.

Displaying logs for a Robot

To view logs of a Robot, go to the Robots page and search for your desired Robot, click on More ``Actions , and then click on View logs to view log messages from your Robot:



Using Orchestration Server to deploy bots

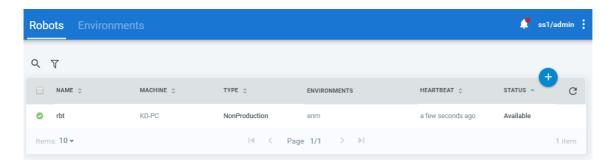
To deploy Robots to Orchestrator, we need to configure the machine with Orchestrator. To do this, we first have to create a provisioning Robot from the Orchestrator URL: http://platform.uipath.com[.]

Creating a provision Robot from the Orchestrator

The user needs; permissions to register the new Robot and they must have the following information:

- The name of the machine and the key required to connect to Orchestrator. They can be found through the Control Panel | System, for the key, log on to the Orchestrator URL, click on the ROBOTS page, then click on the + button. A pop up window appears where your key is visible.

 Security | System and User | Settings | Deployment, which provides us the Robot API Key.
- The username and password of the specified machine to access it.
- To create the provision Robot, go to the Orchestrator. Click on the Robot option on the left side of the Orchestrator page.
- After displaying the Robot page, click on the + button. It will display a small window to create a provision Robot:



After the window is displayed, fill in all the mandatory information that is required to connect the Robot--machine name, Robot name, username/domain name, password, type, and description, as given in the
following screenshot:

CONFIGURATION

RUNTIME

CANCEL

PROVISION

_
▼
•
▼
Create another
_

- In the Machine * field section, enter the machine name that is required to connect to Orchestrator.
- From the Name * field enter the desired name of the Robot.
- Now in the <u>Domain\Username</u> * field, type the name that will be used to log in to the defined machine.
 Here, we need to define the format <u>Domain/Username</u> * if the user is in the domain. It is compulsory to choose a short domain name.
- Password field is optional; it can be skipped.
- We can choose the type of Robot from the drop-down list.
- The description field is also optional. You can give a short summary describing your Robot.
- Now copy the Robot Key * and paste the key in UiPath Robot while configuring your Robot.

• Click the **PROVISION** button and the Robot will be displayed on the Robot page.

Connecting a Robot to Orchestrator

When we deploy a Robot to Orchestrator, we must have the machine name and the key for each Robot. To keep the value of these fields, we can create another Robot from the **Provisional Robot** windows.

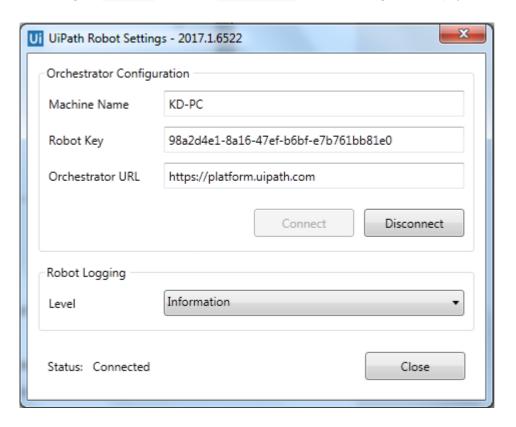
If we want to create a new Robot, we have to take authentication from administrator. By default, the administrator has the right to register a new Robot.

To connect the Robot machine to Orchestrator, follow the given steps:

1. From the system taskbar, click on UiPath Robot. The Robots windows will be displayed:



2. Now go to Options and choose Settings...; the Robot Settings will be displayed:



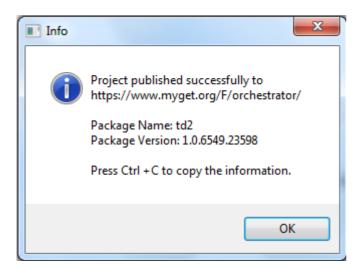
- 3. In the Robot Key field, paste the received key of provision Robot to Orchestrator.
- 4. In the Orchestrator URL field, enter the address of the Orchestrator.
- 5. Now click the **Connect** button. After clicking the **Connect** button, the Robot will connect to the Orchestrator.

Deploy the Robot to Orchestrator

To deploy our Robot, first of all, it must be connected to Orchestrator. Ensure that our bot is connected to Orchestrator then follow the given steps to deploy it:

1. First of all, install UiPath on the machine.

- 2. Provision the Robot machine and take the Robot key from Orchestrator.
- 3. After receiving the key go to the Robot configuration panel and enter the key here.
- 4. Also, you need to enter the Robot key into the configuration URL, which can be found from the admin section of Orchestrator.
- 5. Publish the project with publish utility from UiPath. When it is published successfully, it will display the information shown in the following screenshot:

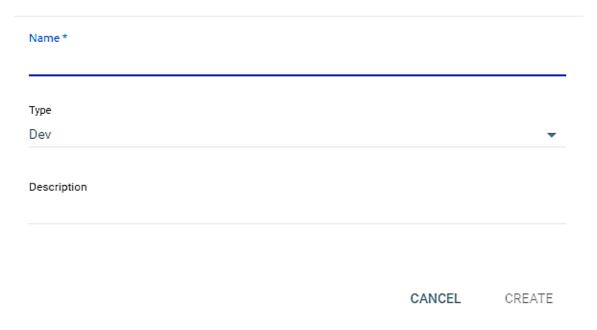


- 6. The project has been published in the Orchestrator.
- 7. To create the environment, go to the home page, click on the **ROBOTS** option, and click on the **Environments** Tab. Then click on the + button:



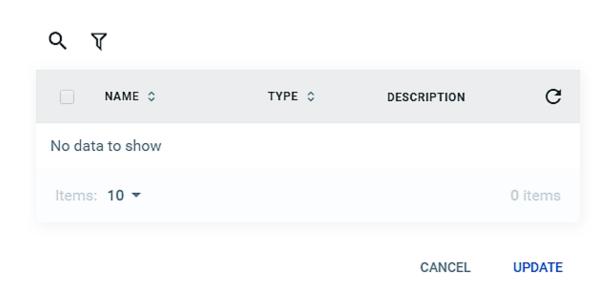
8. Once the details are filled in, click on Create:

Create Environment

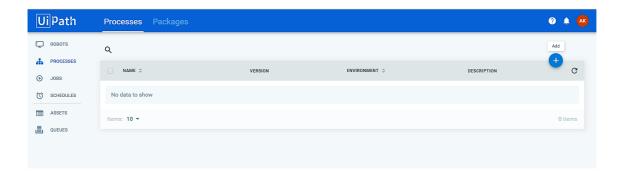


9. After creating the environment, a small window will appear as shown in the following screenshot, where we can manage the Robot within the environment:

Manage DevTest Environment



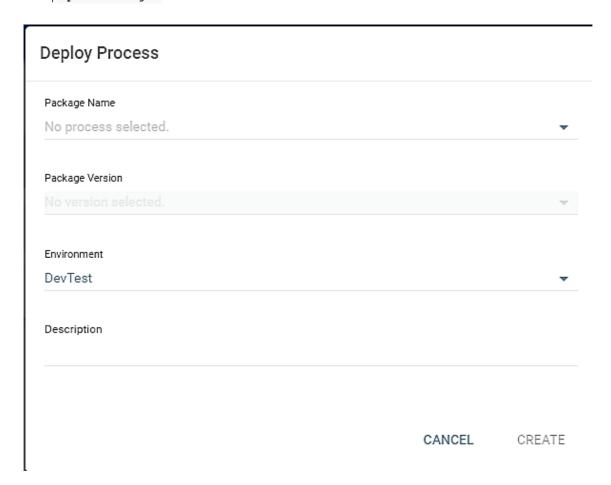
10. After clicking on the + button, a will window pop-up where we can choose the Published package, as shown in the following screenshot, and then click on the CREATE button:



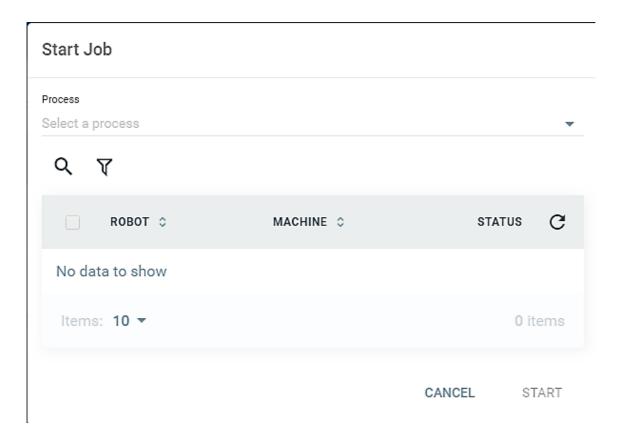
11. After clicking the **Deploy Process** button, a window popup will appear where we can choose the published package, as shown in the following screenshot, and then click on the **CREATE** button.

OR

12. Packages can be manually uploaded from the local directory after clicking the View Packages option and then clicking the Upload button as given in the following screenshot: PROCESS | View Packages | Upload Packages :



- 13. Now the package has been deployed to the Orchestrator and is ready to be executed through the web.
- 14. Next, click the JOBS option for execution and click on the Start icon as shown:



15. After clicking the Start Job button, the Robot will execute over Orchestrator.

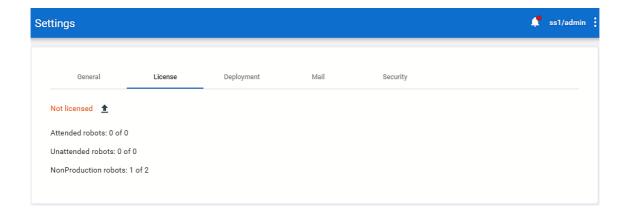
License management

To manage and deploy bots, we are required to register the license on their server. Once you have received the license, the deployment and maintenance processes become faster.

Activating and uploading a license to Orchestrator

After getting the license code from the sales support team or any centralized location, we need to follow the given steps to activate the license and upload it to Orchestrator:

- 1. It is mandatory to have the UiPath Platform installed on the local machine.
- 2. If the UiPath Platform is not available then install it.
- 3. Now open the Command Prompt as an administrator account from the local machine.
- 4. Here we can change the directory for installing the path manually with the command cd C:\Program Files (x86)\UiPath Platform\UiPath.
- 5. To activate a license, we need the Regutil tool. If this tool is available, then type the following command to activate it through the command line: regutil activate /email=emailaddress /code=licensecode.
- 6. Now export the license information to the file using the command regutil export-info /out_file=D:\license.txt [.]
- 7. Go to Orchestrator and click the Admin option. Then select the** ** Settings page from the drop-down list:



8. As the **Settings** page becomes visible, we can see the **License** tab, as shown in the preceding screenshot. Click on **License**. Then under the **License** portion of the page, we can see our available license with an option for uploading it. Click on the **Upload** option.

After successfully uploading the license, navigate to the license information, which is created by using the Regutil tool and the uploading methodology. Here, the license expiry date of each Robot can be checked. Whenever we connect a new Robot to Orchestrator, it consumes a new license.

Publishing and managing updates

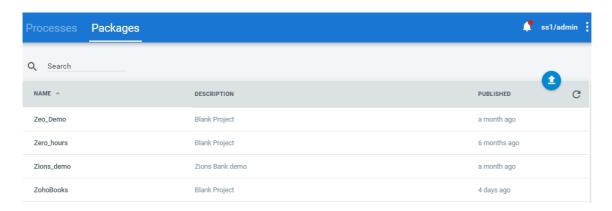
When we successfully create a workflow that can be used to perform certain automation, it should be published. This is necessary because, if we open UiPath Studio and run the workflow each time we require it, then it will consume a lot of time and also require human involvement to do it. This is not the right approach while automating. Hence, we publish our workflow so that it can run very easily using UiPath Robot or Orchestrator. Sometimes, we may want to make some changes to the workflow that we published earlier. For that, we have to make changes and publish it again so that the latest workflow is available on Orchestrator. This workflow is also updated to the latest version.

In this section, we will understand how to publish a project and how to update it.

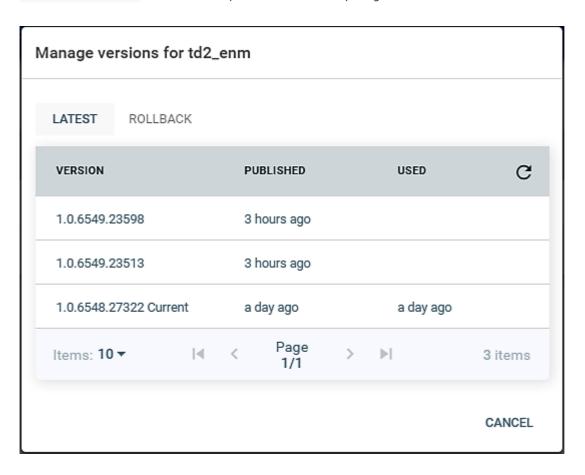
Packages

When projects are published to Orchestrator from UiPath Studio, they become packages. These packages can be found on the Process page after clicking on the Packages option.

Published packages are shown in the following screenshot:



Orchestrator provides the facility to update, view, or delete your packages from the Packages page. Every package in Orchestrator contains a version, its published date, and its description. Suppose we have a package and we want to make changes to that package, say, we have added some new functionality to that package from UiPath Studio and publish it again. In order to use the newest version of that uploaded package, we can view that package from the Packages page, as shown in the preceding screenshot, and then it will display all the available package versions for that package. In order to update the version, either select the version of your choice or click on Get the latest version to use the latest uploaded version of that package:



In the preceding screenshot, the user can view and delete all published packages that were published to Orchestrator.

Package versions can have two statuses:

- Active: When a package version is in active mode then it means that the version is currently in use
- Inactive: If a package version is inactive then it means that this version is not in use

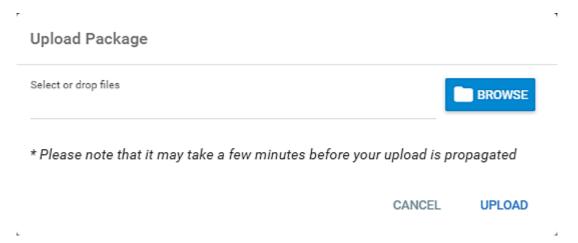
Managing packages

After a package has been created on the Orchestrator Server, we can easily view them in the **Packages** tab on the **Processes** page. Here, we can upload or remove packages.

Uploading packages

When we publish our project to the Orchestration server, it will automatically send the package to the server. If we want, we can upload the package manually as well. For that, Orchestrator provides the facility to upload a project manually from the local machine. To upload packages, we need to follow the given steps:

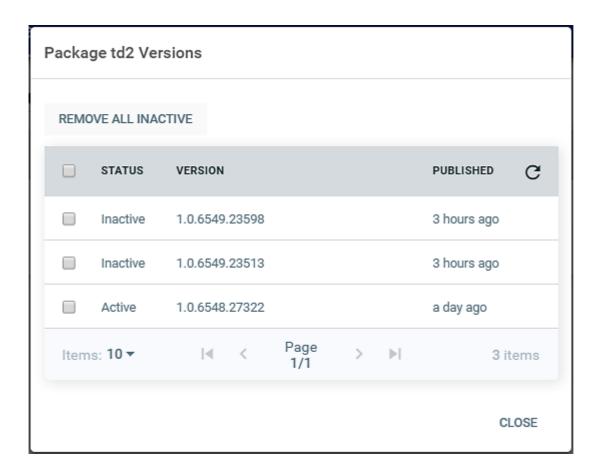
1. Navigate to the **Processes** page, select the **Packages** option, and then click on Upload packages. A dialog will appear in the window like in the following screenshot:



- 2. Now click the **BROWSE** button and select the packages from the local machine with a name for the uploaded file.
- 3. After selecting the proper package click on the **UPLOAD** button so that the package becomes available with the currently existing packages on the **Packages** page.

Deleting packages

When we no longer require a package then we can easily delete it. Make sure that the process is not in active mode. We can just select our package and click on the **Remove** button. We may also remove multiple packages at the same time by checking one or more packages from the list or by clicking on the **REMOVE ALL INACTIVE** tab to remove all packages that are inactive:



Summary

As we approach towards the end of the course, let us quickly go through what we learnt. We started off by learning about RPA, its scope, and some tools available for RPA. Then we delved into more details about UiPath, its components, and setting up UiPath Studio to train your own bot. You also got to know about the user interface for UiPath Studio before beginning to design your first Robot. Once comfortable enough, we explored a fascinating aspect of UiPath, that is, recording. In Lab 3, we saw how a workflow was structured and the different types of project available in UiPath---when they are used and how to use them. Lab 3 also introduced you to activities and how to manually drag and drop activities to make our workflow, all this in the user-friendly interface provided by UiPath Studio!

In Labs 4 through 7, we went deeper into UiPath: we learned more about recording, about data manipulation, the various controls in UiPath, about extraction, selectors, OCR data scraping, and screen scraping. We also read about the various plugins available and about assistant bots.

That's not all; an important aspect of your automation journey is properly organizing your project, as well as being prepared for handling exceptions. All of these were dealt with in detail in Lab 8 and Lab 9.

Finally, you were taught how to deploy your bot.

From being a novice at the beginning of the course, you are now skilled enough to develop and deploy a bot! Your automation journey has begun!