Recording with IBM RPA

Hands-on Lab

Version 1.2 for BP workshops using on-prem

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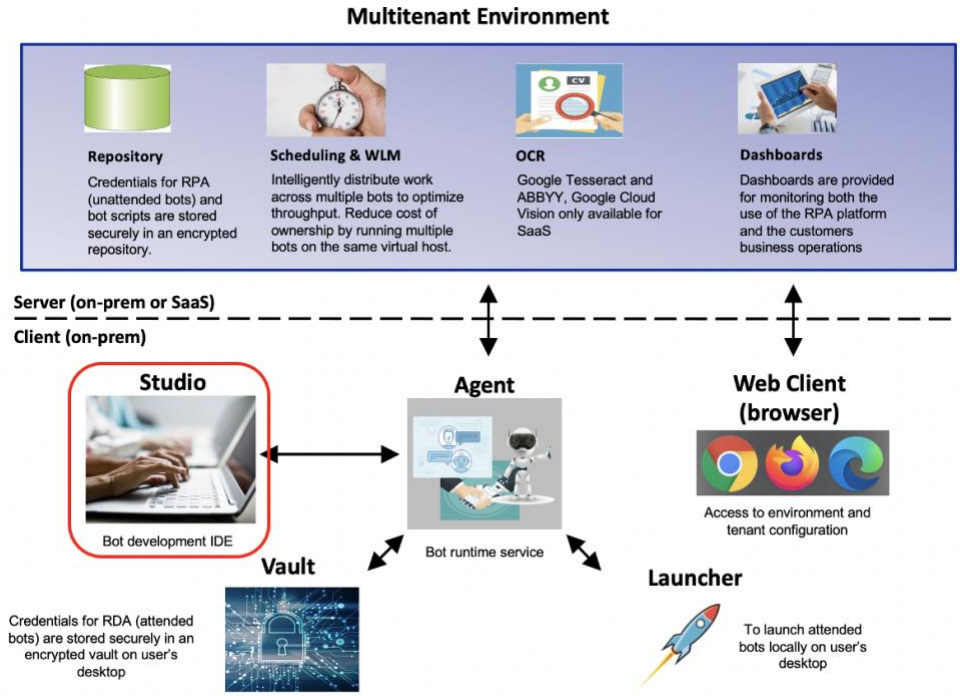
1. Introduction

This hands-on lab you will use IBM RPA Studio to make outbound calls via assorted functionality. You will utilize the sales leads file from previous labs and query assorted services.



Use case

In Lab 1 you learned how to automate processing of sales leads that arrive in a CSV/Excel format. The bot you created in Lab 1 automatically entered the sales leads into the online opportunity system of record (JK Automation Sales Leads).

In this lab you will modify your bot to interact with some legacy systems. And to do that, you will use the IBM RPA Studio recorder.

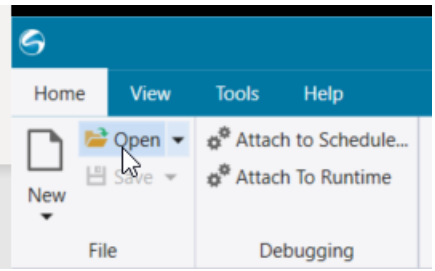
Prerequisites

None. You have everything you need in your lab environment.

2. Lab Instructions

Open the starting point script

_1. In IBM RPA Studio, Select `Open`.

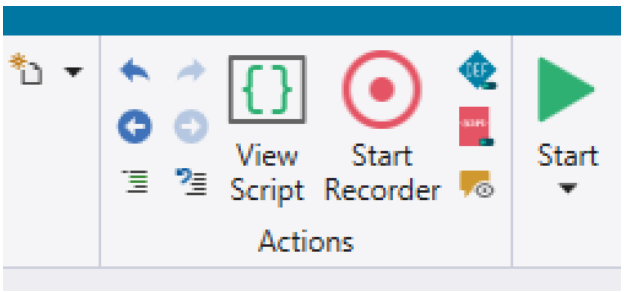


_2. Navigate to C:\Users\Administrator\Desktop\IBM RPA Lab Resources\Lab 4 - Recording with IBM RPA, select **sales-lead-automation-recorder-start.wal** and click `Open`.

Windows Application Automation

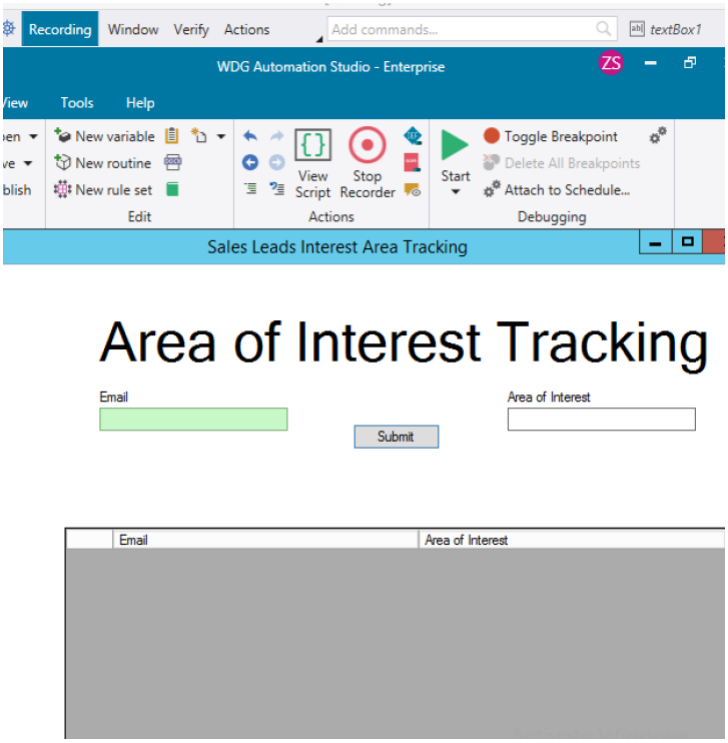
_1. Select Designer Mode for viewing your script.

_2. Click Start Recorder at the top of your screen.



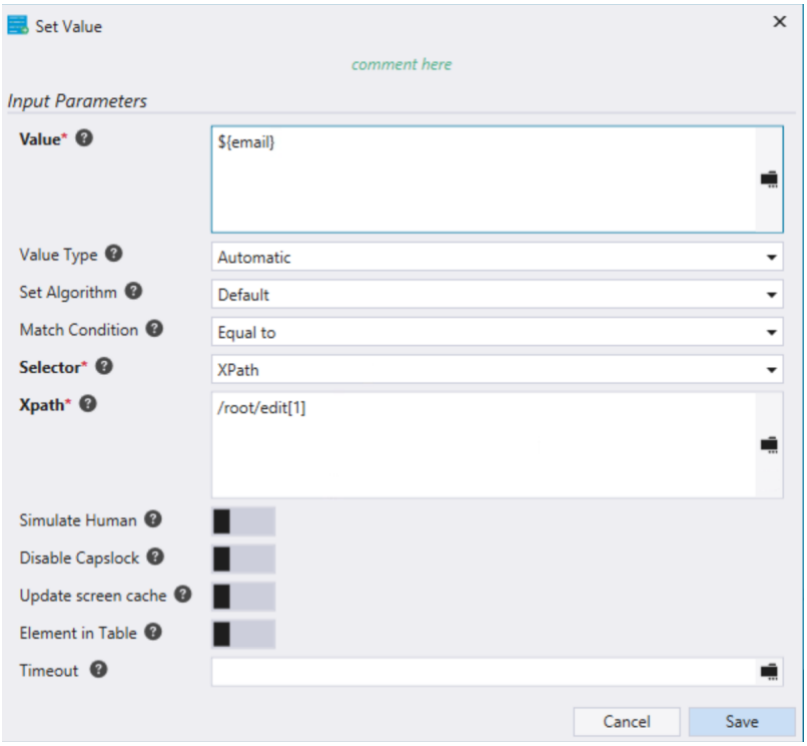
_3. When the recorder has started, click the IBM RPA logo (bee) on the top left-hand side of the screen, select **Windows**, then **select *SalesLeadInteresTracker.exe*** file from the Lab 4 folder and click **Open**. If you see security warning just click **Run** to proceed.

_4. Place your mouse cursor over the Email field and **hold Left Control**. The field should turn Green. This means that the recorder was able to recognize the field.



_5. From the recorder bar at the top of the screen, select ***Actions → Set Value → By XPath***. The command configuration window opens with all the needed options to select the Email input field from the UI.

_6. Add the **email variable** to the value section, then click save.

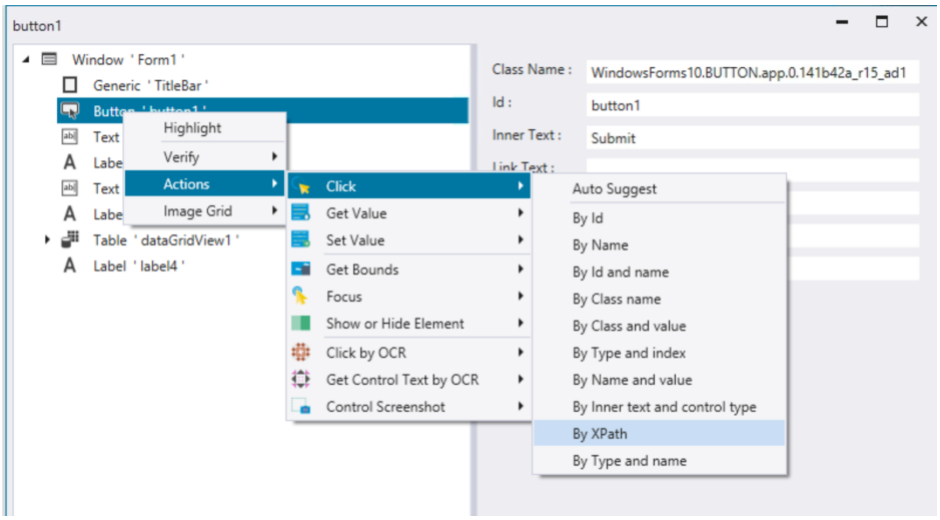


_7. Repeat the same steps to set the value also to **Area of Interest** input field. Use the **interest** variable.

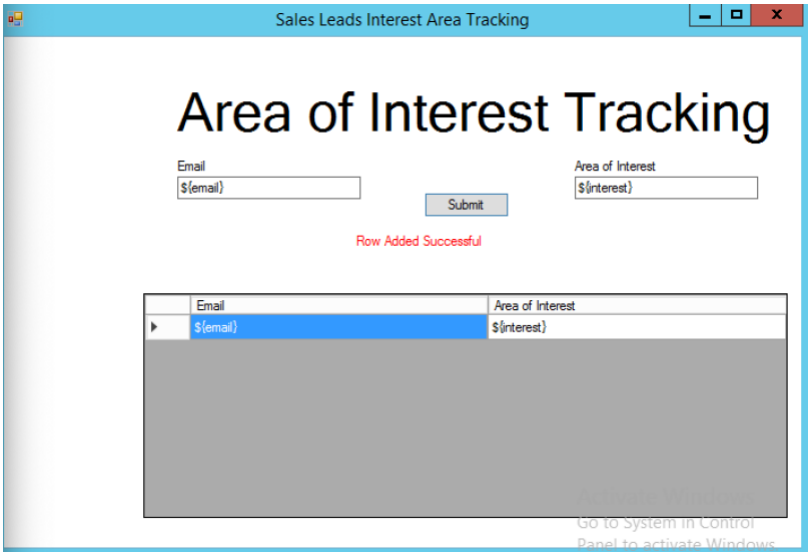
_8. Now Click the word in the top right-hand corner of your screen, in the recorder bar. It should say ***textBox2***.

_9. This will open the XPath tree of the Windows Form. **Right-click** the **Button (button1)** element, select ***Actions → Click → By XPath***. Then Click **Save**.

Also click **Save** to accept the configuration and to close the Click command configuration window.



_10. You should now see the similar view in your windows form as presented below. The recorder has also executed all the actions you selected.

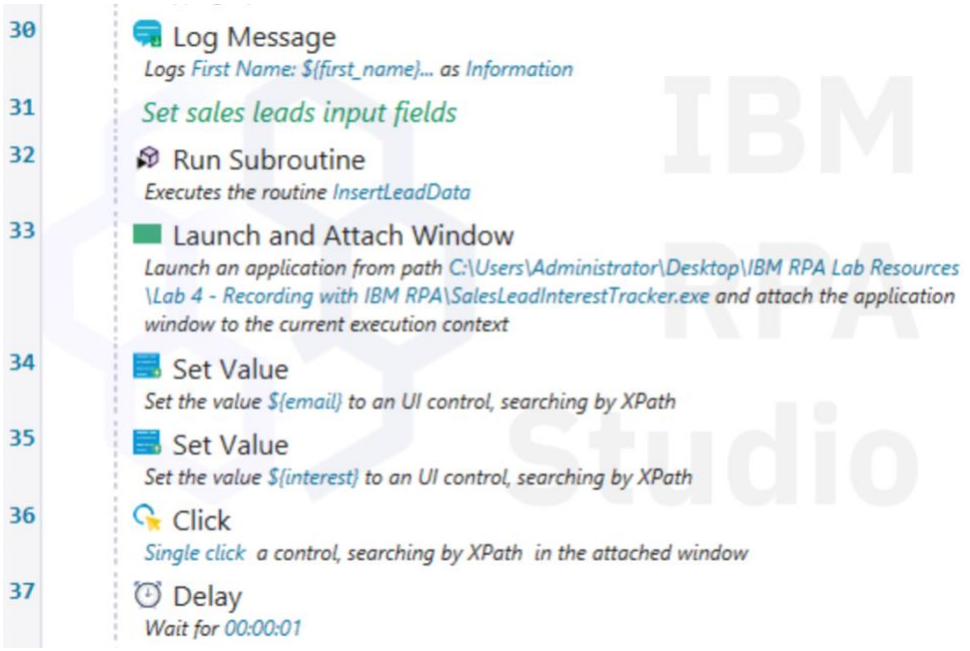


_11. Now **click the X in the top right of the screen** to close the recorder.

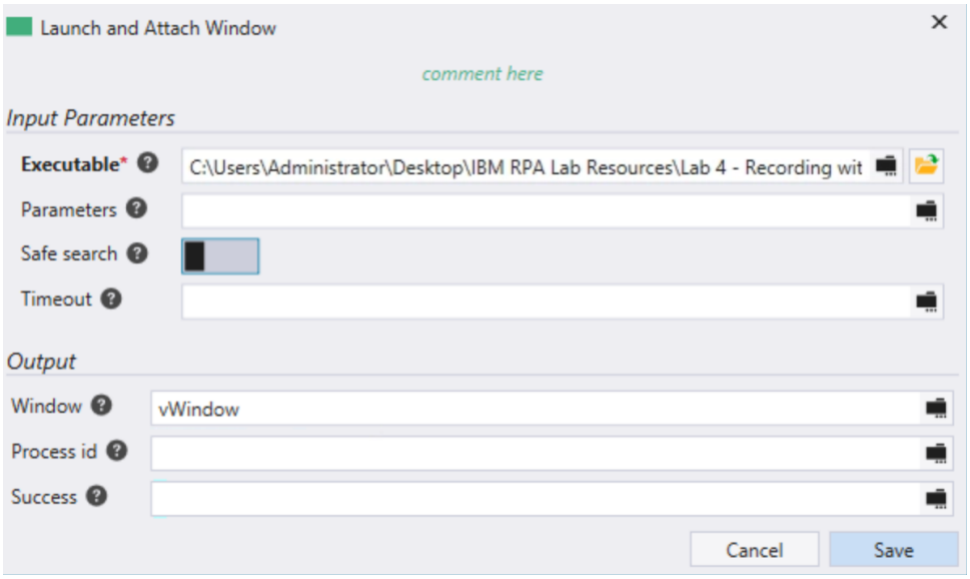
_12. Scroll down to the bottom of your script code to see the added 4 commands.

_13. Select all the commands (Shift+click) and move (drag and drop) them right after the Run Subroutine -command on line 32.

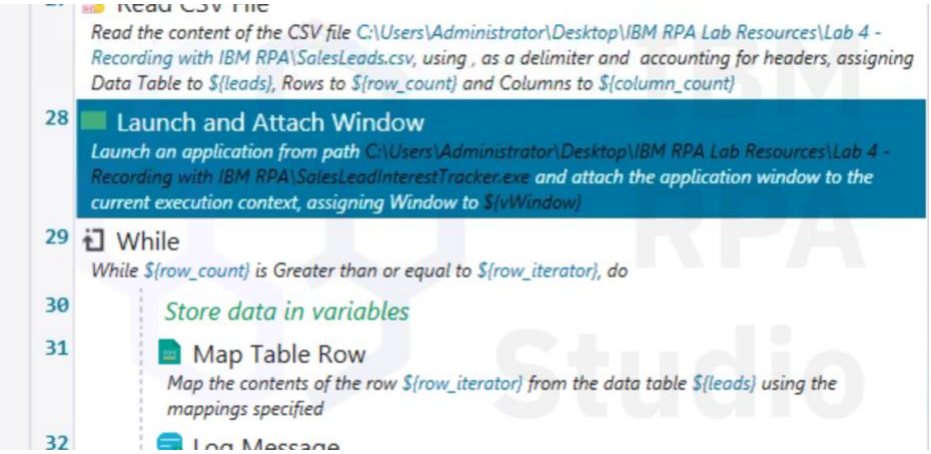
Your script should now look as follows:



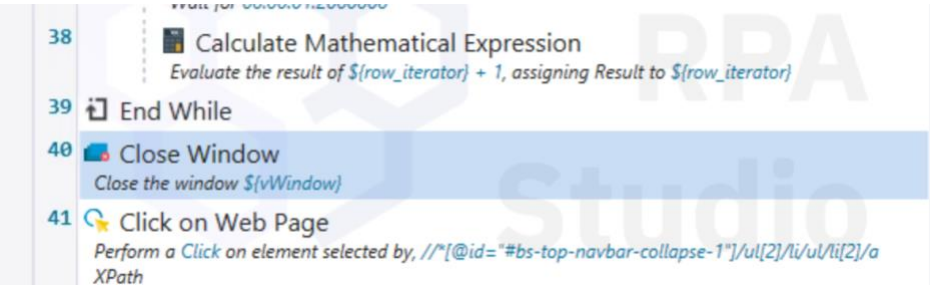
_14. Double click the **Launch and Attach Window** -command in your script and add **vWindow** as the output Window variable. Then click **Save**.



_15. Select and move the **Launch and Attach Window** -command **to just outside of the While loop**.



_16. Add a **Close Window** -command after While loop end (End While) and set the binding to our **vWindow** variable.



Test your automation

Please click play to launch and test your bot.

THIS COMPLETES THIS HANDS-ON LAB

3. Work with a Completed Automation

If you just want to run the automation without authoring it or if you just want to look at a completed solution, follow these instructions below.

1) Open **sales-lead-automation-recorder-complete.wal** from Lab 4 folder
2) Run the bot