Launch a BAW Process from IBM RPA

Hands-on Lab

Version 1.2 for
Business Partner
Virtual Workshop
using on-prem

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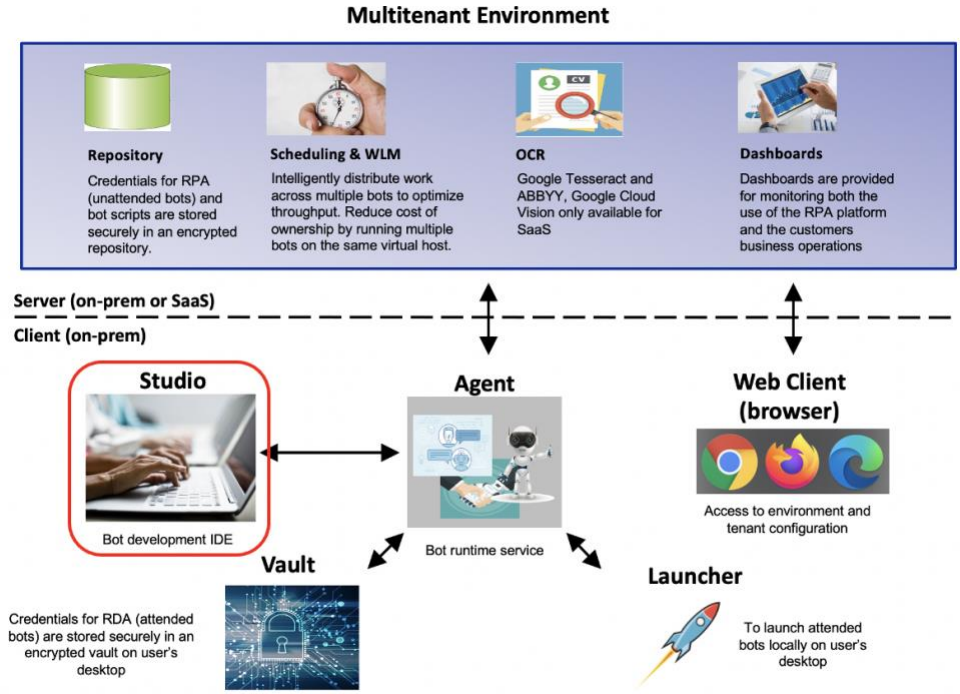
1. Introduction

This hands-on lab you will use IBM RPA Studio to enhance the automation you created in Lab 1. You will start with an existing automation and make the necessary enhancements.



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).

The sales leads designated as “Follow up” require a follow up by the sales team. To automate this your Bot will need to start a Business automation Workflow (BAW) process instance called “Opportunity Management Process”.

The process handles sales leads that have the “Follow up?” flag turned on. In the first step of the process the sales lead information is verified and corrected (for example contact information). In the second step of the process a sales manager explores the opportunity and decides if it should be followed in a “Sales Progression Sub-Process”.

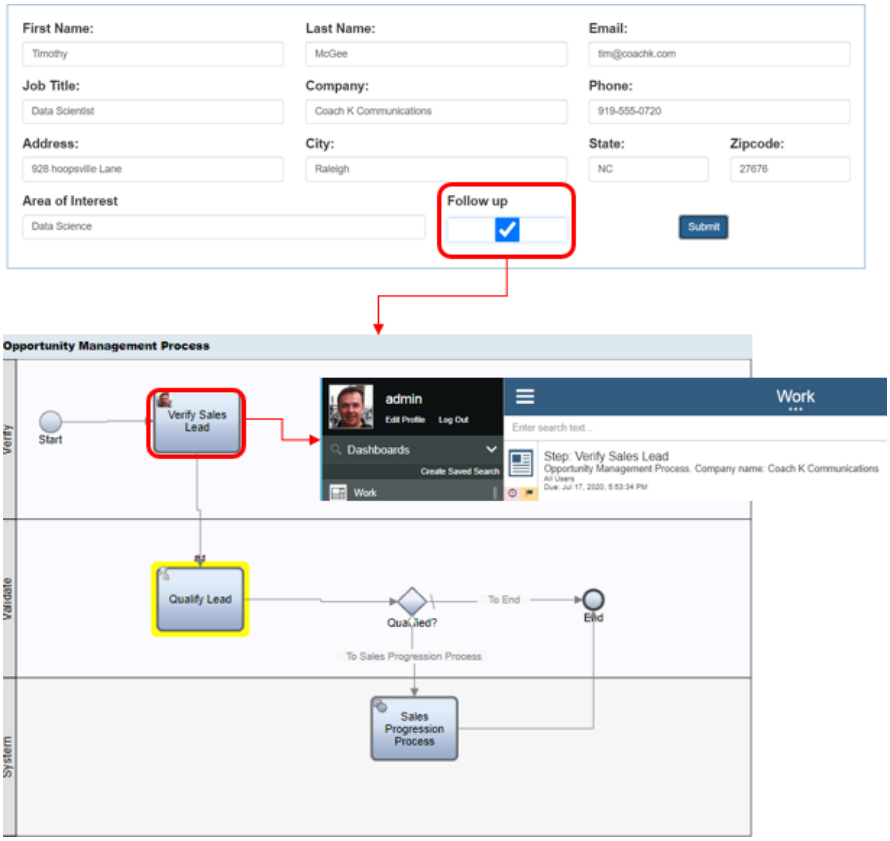


FIGURE 1. OPPORTUNITY MANAGEMENT SALES PROCESS - LAUNCHED BY BOT

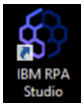
Prerequisites

None. You have everything you need in your lab environment. Just notice that we have already built the "Opportunity Management Sales Process" and installed it to your environments BAW server. Also, the BAW server is started, so you should be good to go 👍

2. Lab Instructions

Start IBM RPA Studio

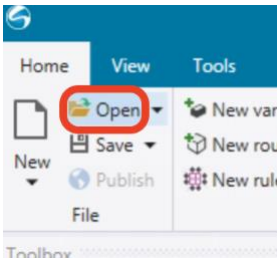
_1. Double-click the `IBM RPA Studio shortcut` in your desktop (if not already open).



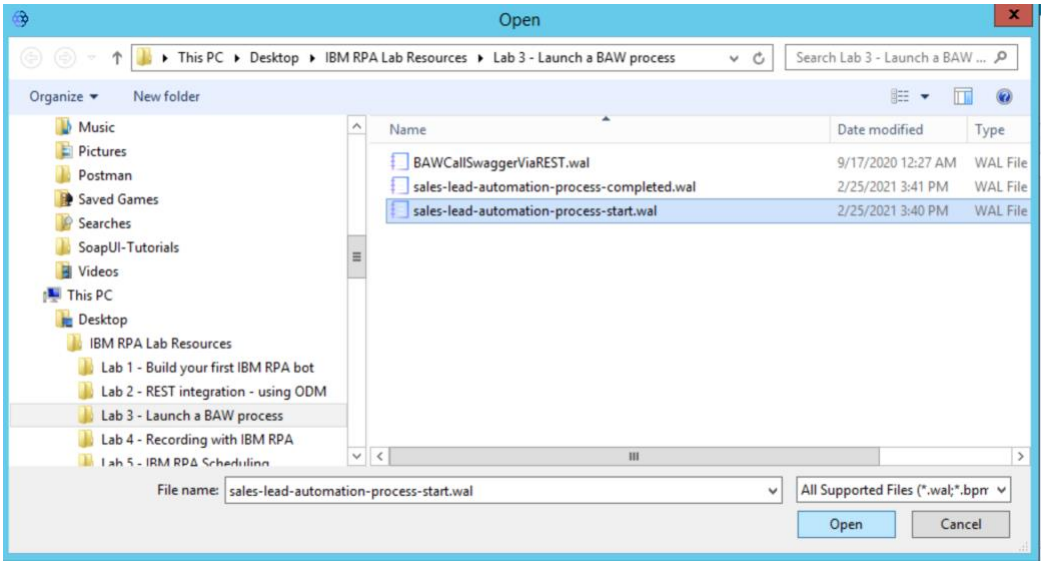
Import Completed automation

You will now import the same automation you created in Lab 1: Build your first IBM RPA bot.

_1. Click `Open` icon from the top toolbar (NOT the dropdown menu arrow besides it).



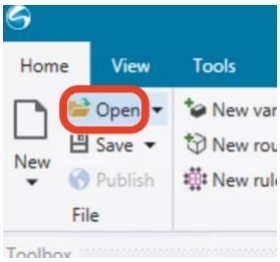
_2. Navigate to *Desktop → IBM RPA Lab Resources → Lab 3 – Launch a BAW process* and select **sales-lead-automation-process-start.wal** and click `Open`.



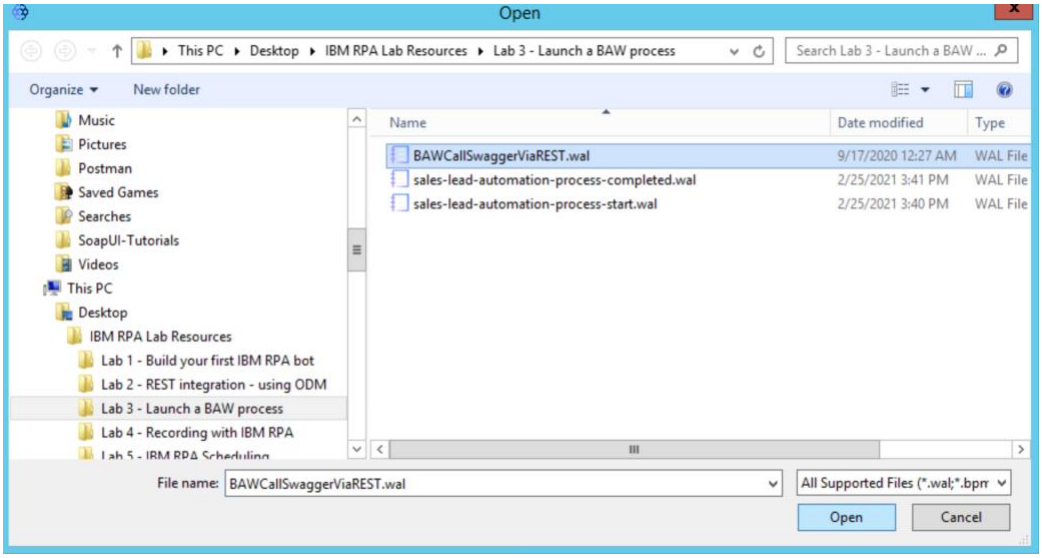
Import BAW REST Bot

Next, you import a bot which you will use in your automation to launch a BAW process instance.

_1. Click `Open` icon from the top toolbar (NOT the dropdown menu arrow besides it).



_2. Navigate to *Desktop → IBM RPA Lab Resources → Lab 3 – Launch a BAW process* and select **BAWCallSwaggerViaREST.wal** and click `Open`. This is a ready-made helper script that has the logic and instructions to call BAW REST API.



Create REST Bot variables

_1. In **BAWCallSwaggerViaREST** automation click `Script` tab.

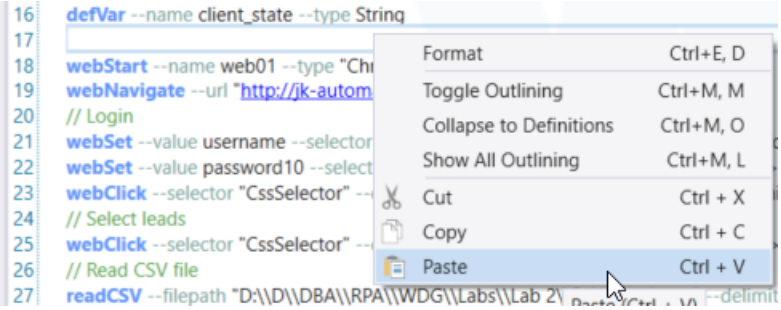
_2. Select three variable definitions from **lines 31-33**, `right-click` and `copy`

_3. Switch back to **sales-lead-automation-process-start.wal.**

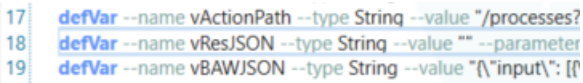
_4. Click `Script` tab.

_5. Select **Line 16**, place your cursor to end of the line and hit `enter` to add a new line below it.

_6. Select **Line 17** `right-click` and `paste`.



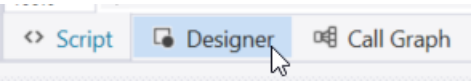
_7. On **Line 17-19** remove the comments `//##` and `Save`.



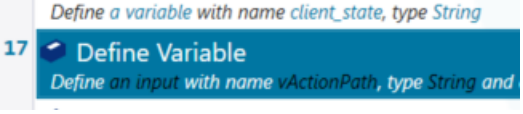
Initialize Execute Script variables

The Execute Script command invoke a Bot that start a BAW Process instance and passes to it the sales lead data extracted from the CSV file.

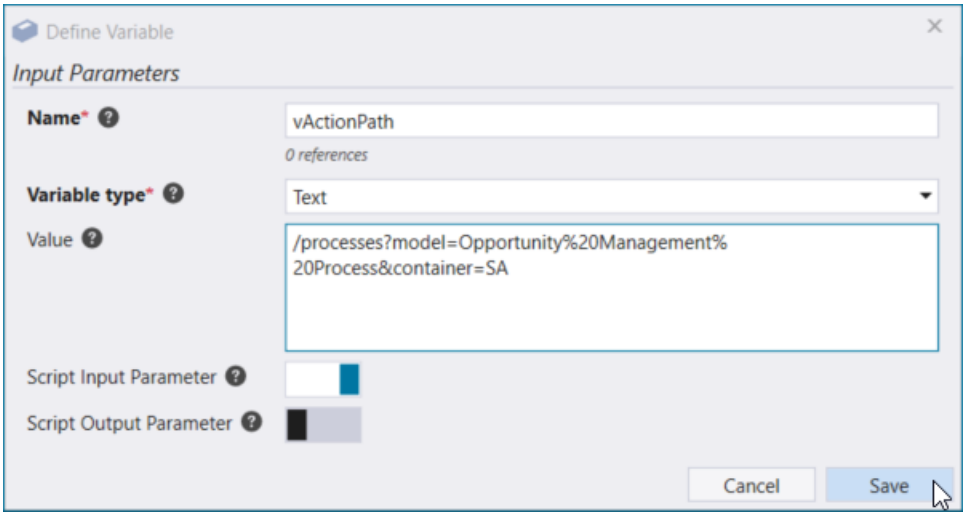
_1. Click `Designer` tab



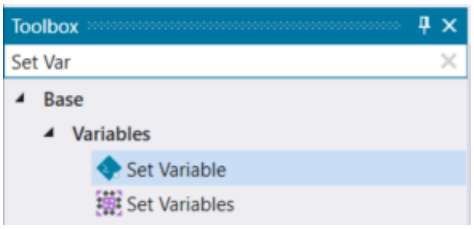
_2. Double-click **Line 17** where we set vActionPath variable.



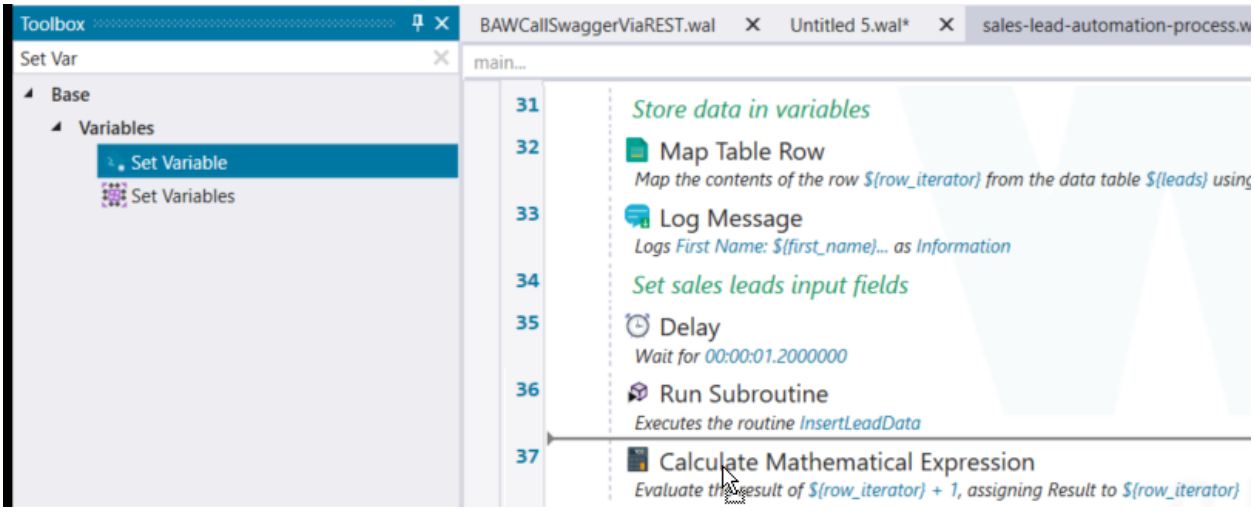
_3. For `Value` replace the current value with **/processes?model=Opportunity%20Management%20Process&container=SA** and click `Save`.



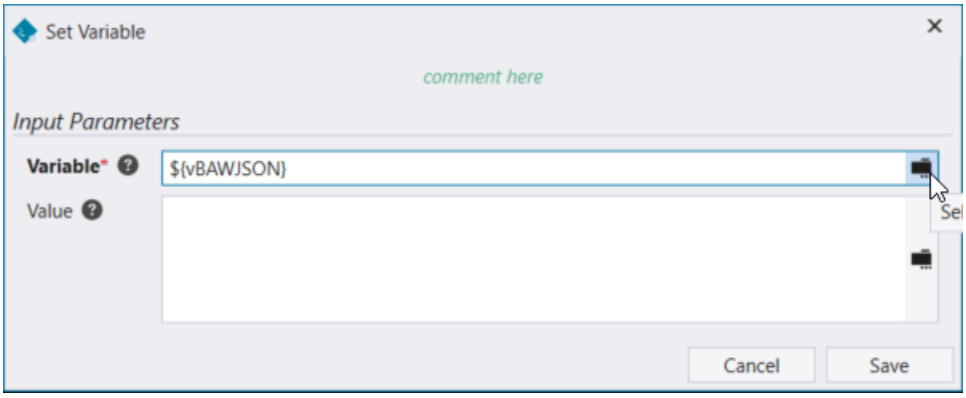
_4. On the `Toolbox` search for **Set Var.**



_5. `Drag and Drop` **Set Variable** after **line 36.**



_6. For `Variable` select an existing variable **vBAWJSON** and click `Save`.

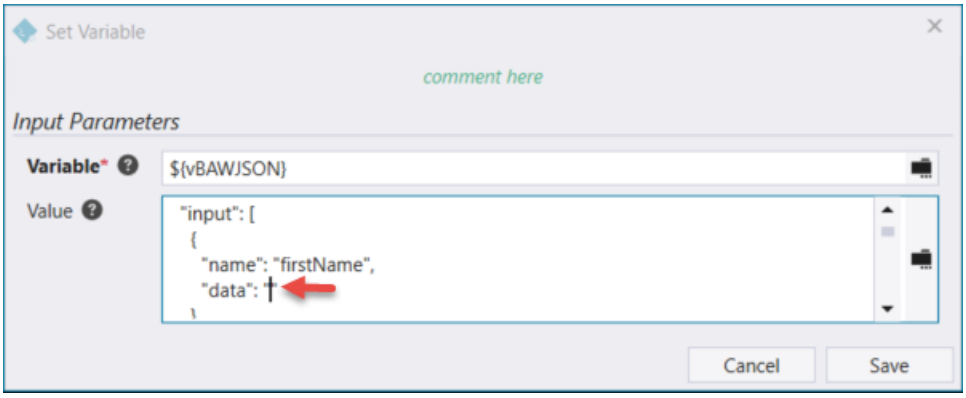


_7. For Value enter (you may want to use **ProcessJSON.txt** file in the Lab 3 resources folder).

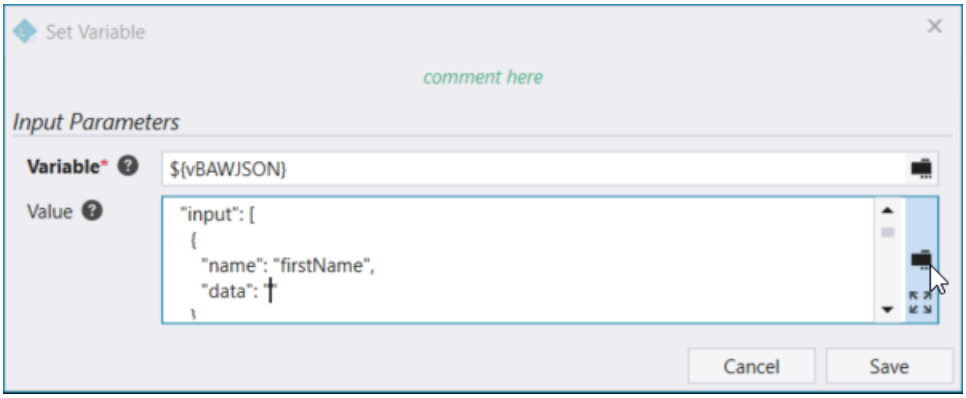
```
{
  "input": [
    {
      "name": "firstName",
      "data": ""
    },
    {
      "name": "lastName",
      "data": ""
    },
    {
      "name": "companyName",
      "data": ""
    },
    {
      "name": "email",
      "data": ""
    },
    {
      "name": "phone",
      "data": ""
    },
    {
      "name": "address",
      "data": ""
    },
    {
      "name": "city",
      "data": ""
    },
    {
      "name": "state",
      "data": ""
    },
    {
      "name": "zip",
      "data": ""
    },
    {
      "name": "areaOfInterest",
      "data": ""
    }
  ]
}
```

You will now need to set all occurrences of “data”: “” with “data”:”{variable}”.

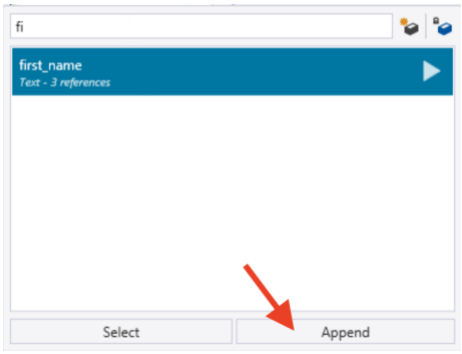
_8. Set the cursor as shown below, inside the double quotes for data value



_9. Click `Select a variable` button



_10. Select **first_name** and click `Append`.

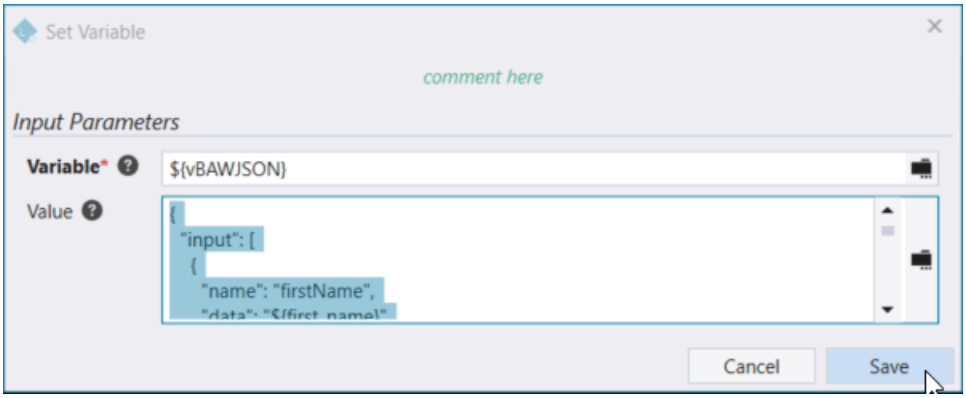


_11. Repeat the above procedure for the remaining data items in the JSON.

```
{
  "input": [
    {
      "name": "firstName",
      "data": "${first_name}"
    },
    {
      "name": "lastName",
      "data": "${last_name}"
    },
```

```
    {
      "name": "companyName",
      "data": "${company}"
    },
    {
      "name": "email",
      "data": "${email}"
    },
    {
      "name": "phone",
      "data": "${phone}"
    },
    {
      "name": "address",
      "data": "${client_address}"
    },
    {
      "name": "city",
      "data": "${client_city}"
    },
    {
      "name": "state",
      "data": "${client_state}"
    },
    {
      "name": "zip",
      "data": "${client_zipcode}"
    },
    {
      "name": "areaOfInterest",
      "data": "${interest}"
    }
  ]
}
```

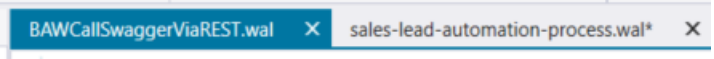
_12. Click Save.



_13. **Save** your work by hitting `Ctrl+S` or the `Save icon` from the top toolbar.

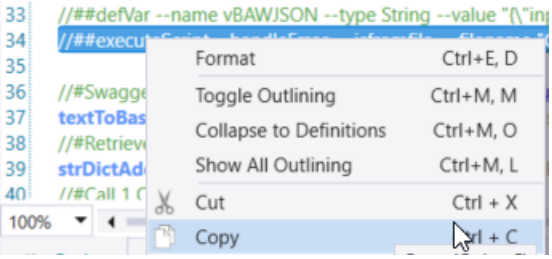
Add Invoke Bot Command (executeScript)

_1. Switch to **BAWCallSwaggerViaREST** automation

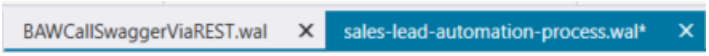


_2. Click `Script` tab

_3. Select **line 34** (the hole line), `right-click` and `copy`.



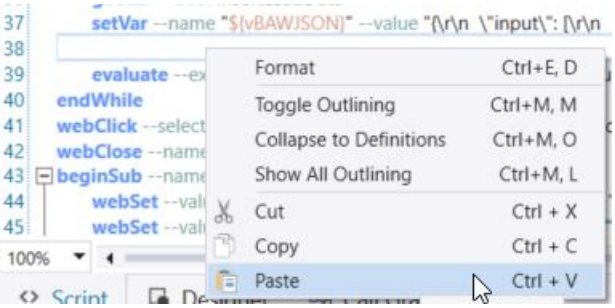
_4. Switch back to **sales-lead-automation-process.wal**



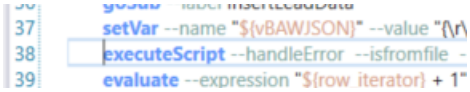
_5. Click `Script` tab

_6. Enter new line below **Line 37**.

_7. Select the new line (38) `right-click` and `paste`.



_8. On **Line 38** remove the comments `//##`

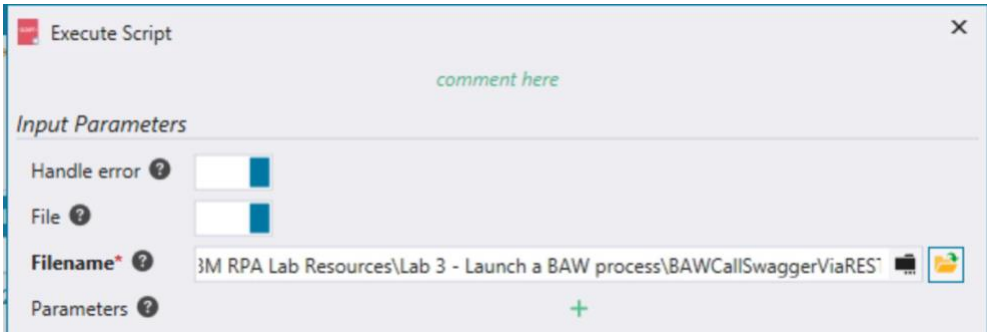


Initialize Invoke Bot Command (executeScript)

_1. Click `Designer` tab

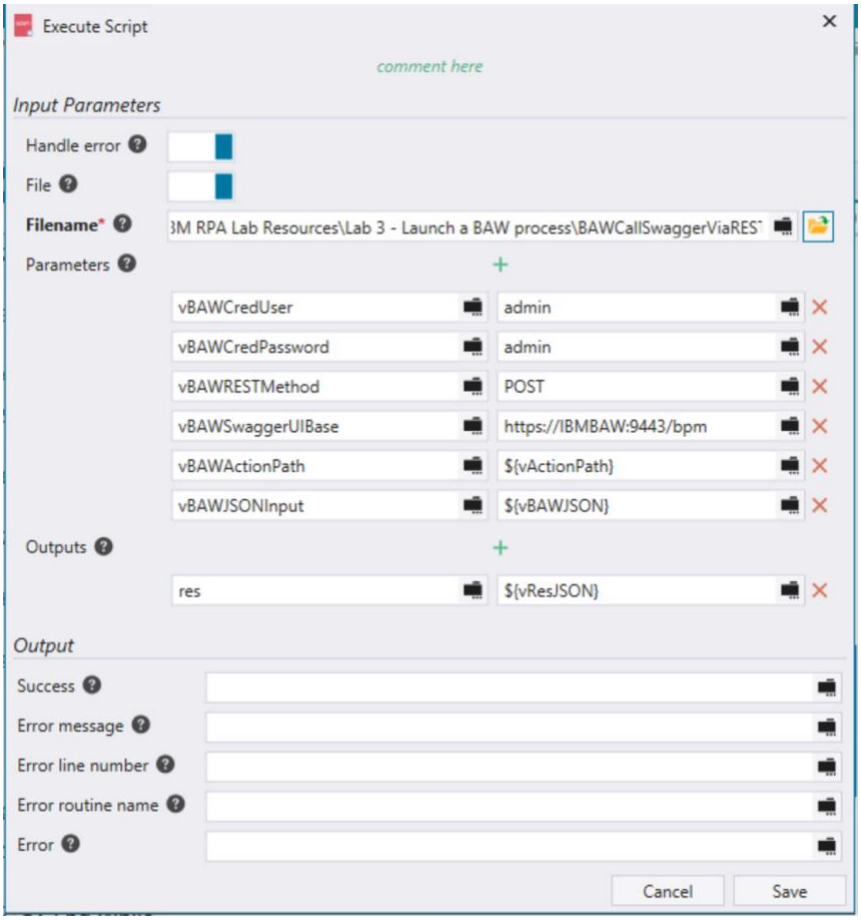
_2. Double-click **Line 38**.

_3. Click File selection helper icon and navigate to *Desktop → IBM RPA Lab Resources → Lab 3 – Launch a BAW process* and open **BAWCallSwaggerViaREST.wal.**



_4. Set Parameters as follows, and then click `Save`. *NOTE! In production automation we would definitely utilize the credential store to retrieve the credentials to use here.*

Parameter	Comment	Value
vBAWCredUser	This is the BAW Server user id	admin
vBAWCredPassword	This is BAW Server password	admin
vBAWSwaggerUIBase	This is the Start Process REST API endpoint. You will need to select you own IP or host name. You can use either the IP or host name.	https://IBMBAW:9443/bpm

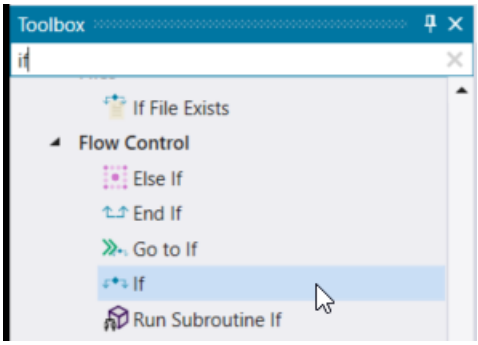


_5. Save your work by hitting `Ctrl+S` or the `Save icon` from the top toolbar.

Add process invocation rule

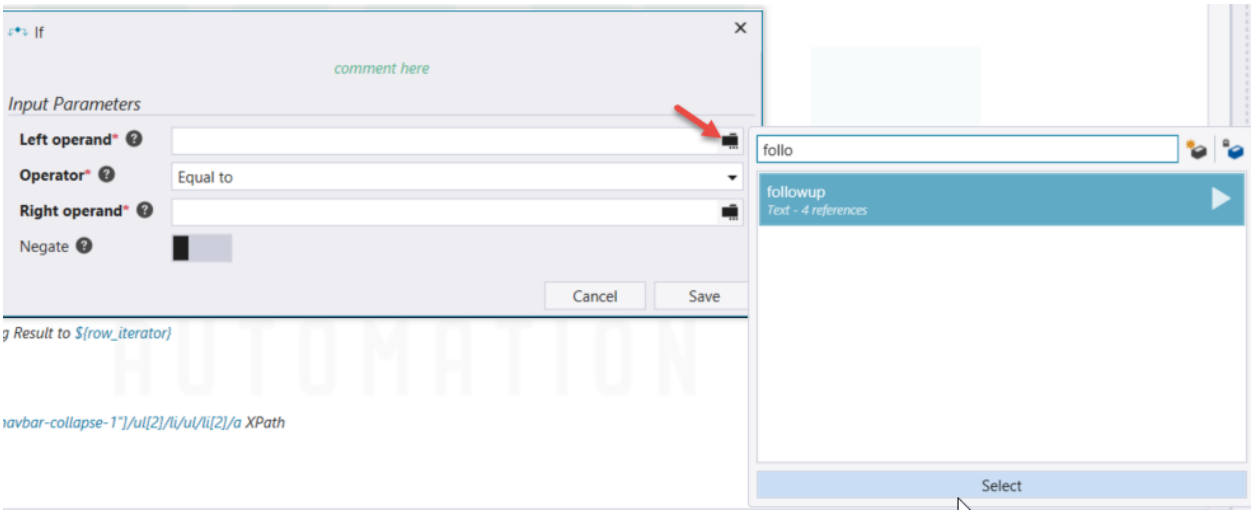
Since we only want to start the process if follow up is requested, let's add an if clause to enforce this rule.

_1. On the `Toolbox` search for **If**

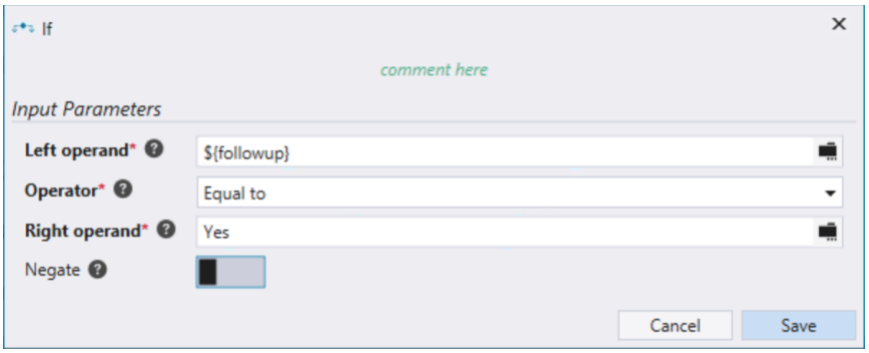


_2. Drag and drop the If command between line 37 and 38

_3. To set **Left operand**, click `Select a variable` icon, select variable **followup** and click `Select`



_4. For **Right operand** type **Yes** and then click **Save.**



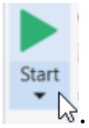
_5. Move (drag and drop) the **End If** clause after line 40 – Execute Script command.

_6. **Save** your work by hitting `Ctrl+S` or the `Save icon` from the top toolbar.

Nice! All done with the configurations. You can start testing 👍

Test your automation

_1. Click the green `Start` icon form the top toolbar. Alternatively, you can hit `F5`. Let the automation run through.

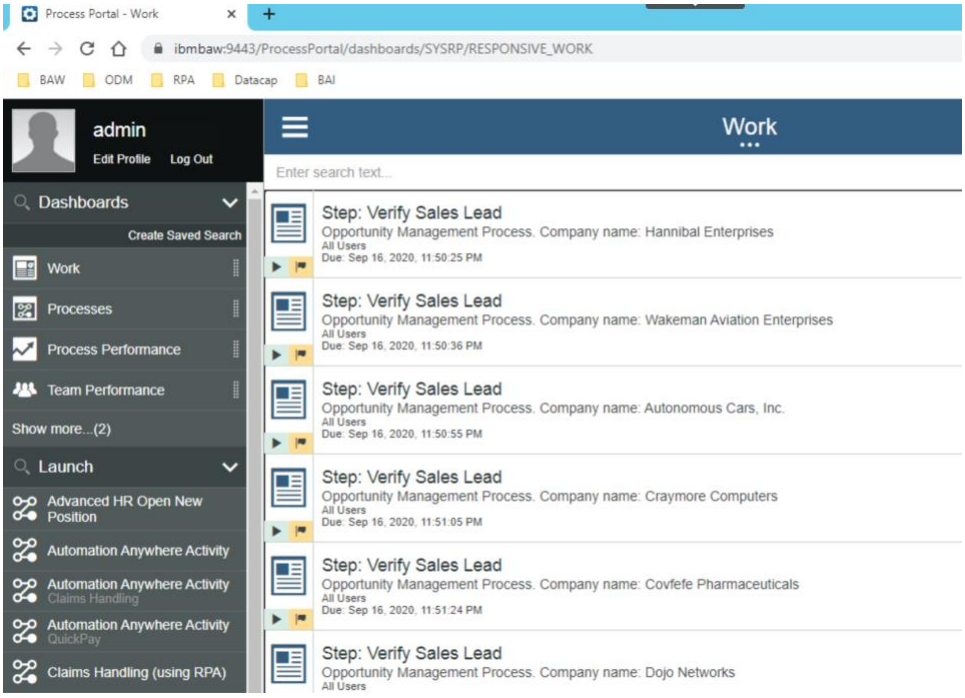


Examine generated process instances

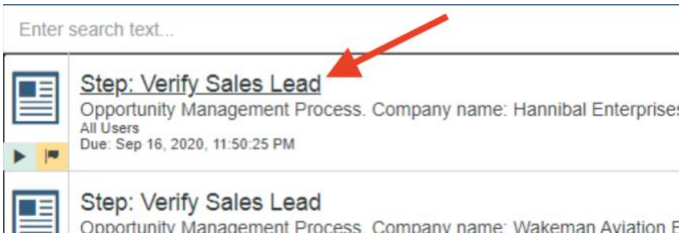
_1. Switch to your Business automation Workflow Server Process Portal by **opening a Chrome web browser** and selecting **BAW → Process Portal** from the bookmarks bar.

_2. Login as **admin**. Password: **admin**.

You should now see only **Verify Sales Lead** tasks but only for the entries in the CSV file where the Follow Up was set to Yes.

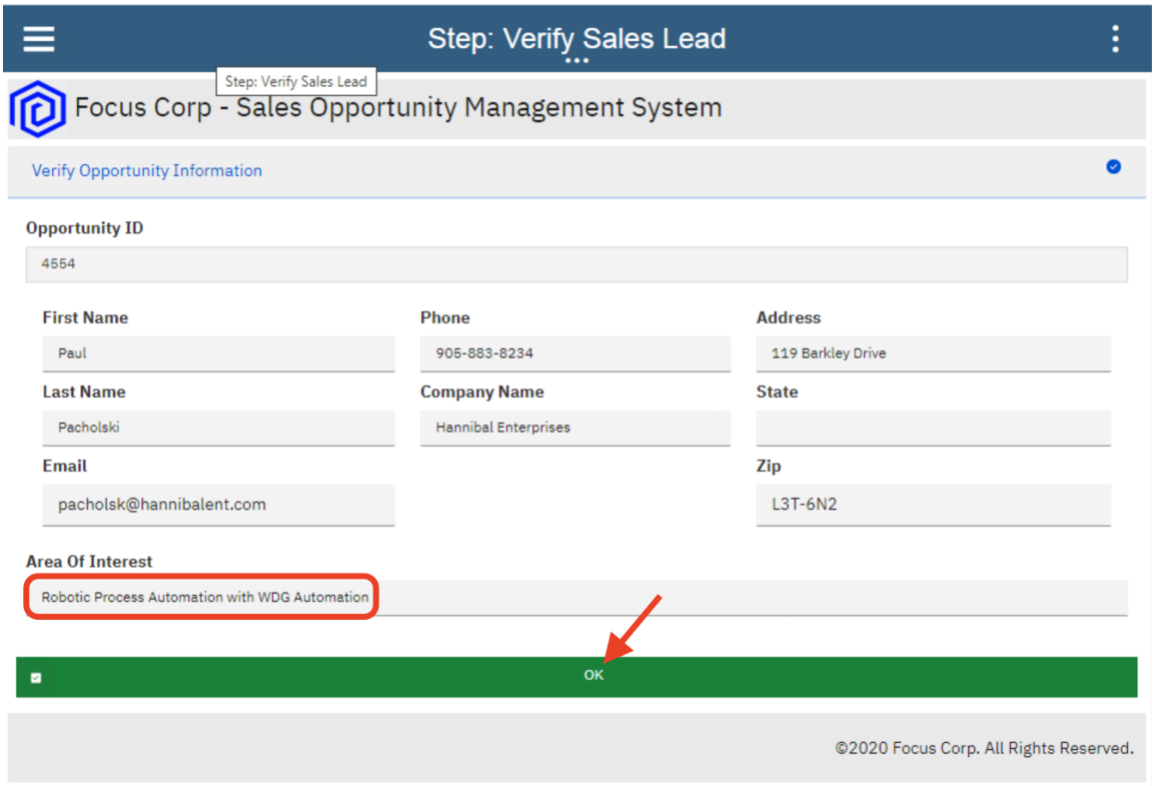


_3. Click on the first task to claim it

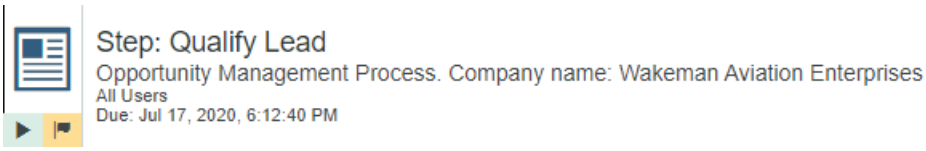


The purpose of this task is to verify the opportunity details and change the details if needed.

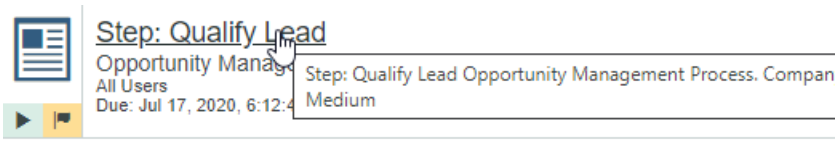
_4. Change the Are of Interest to **Robotic Process Automation with WDG Automation** and click OK.



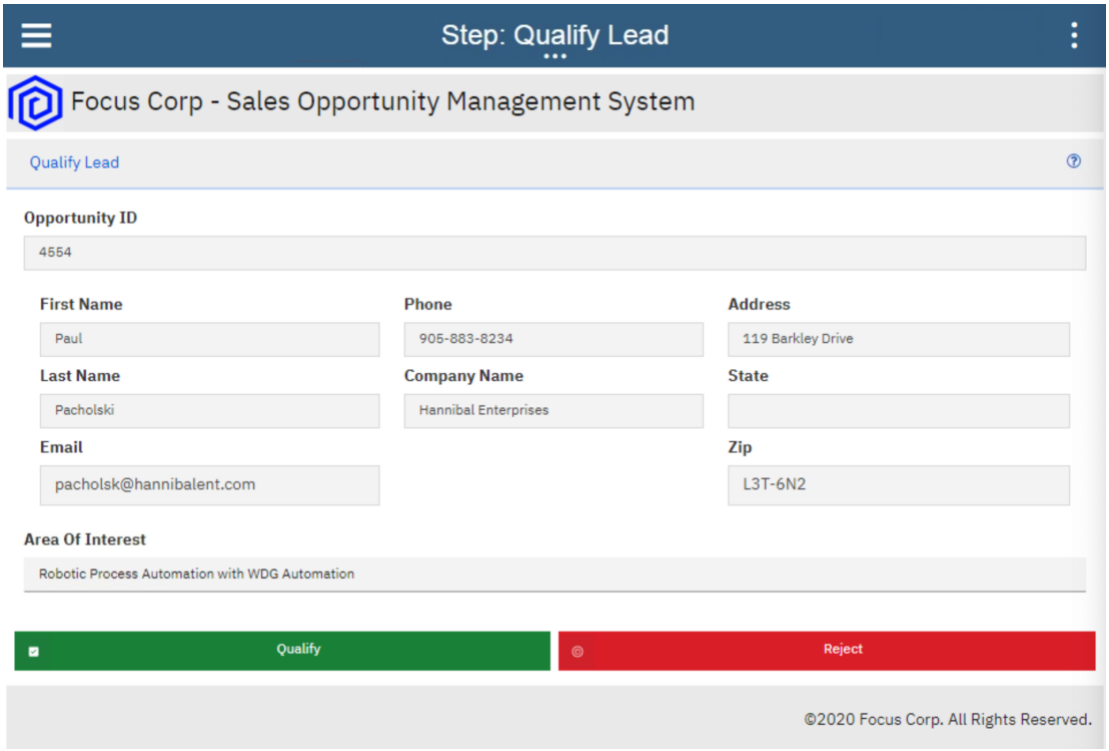
You should now see **Qualify Lead** task at the end of your task list. The sales manager can use the information supplied in this activity to further investigate the lead and make the final decision to continue with the lead or abandon it.



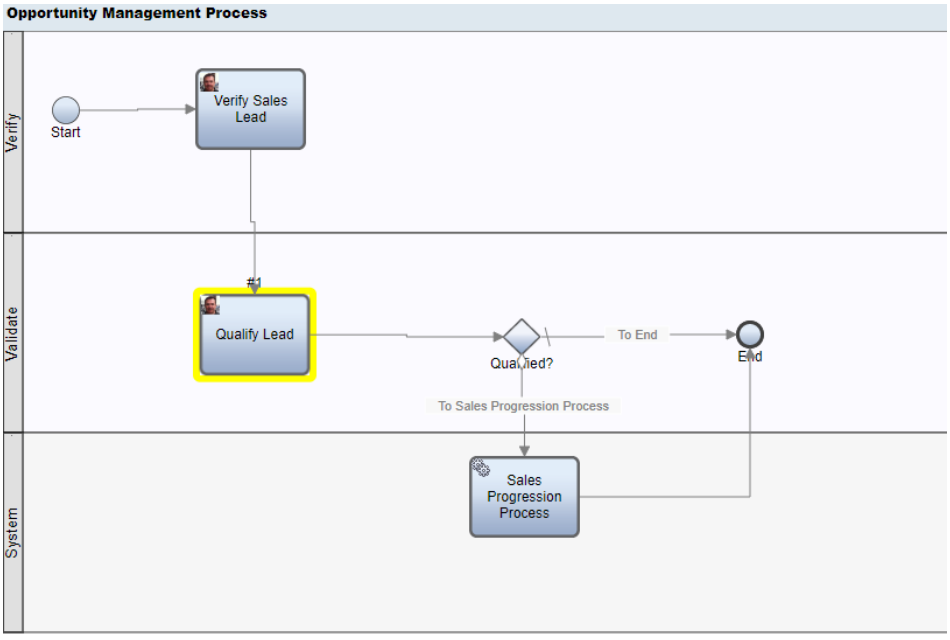
_5. Click Qualify Lead task to claim it.



Note that all the information is now available as red-only.



The Sales Manager can examine the sales lead data and make the decision. While Reject will stop the process instance, clicking Qualify moves to the next step where the actual Sales Process begins!



_6. Click **Qualify.**

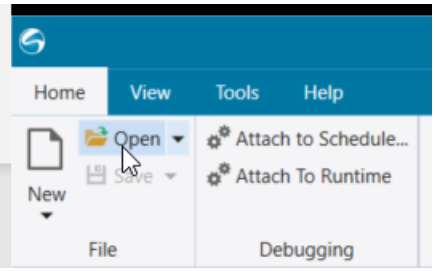
THIS COMPLETES THIS HANDS-ON LAB

3. Run Completed Automation

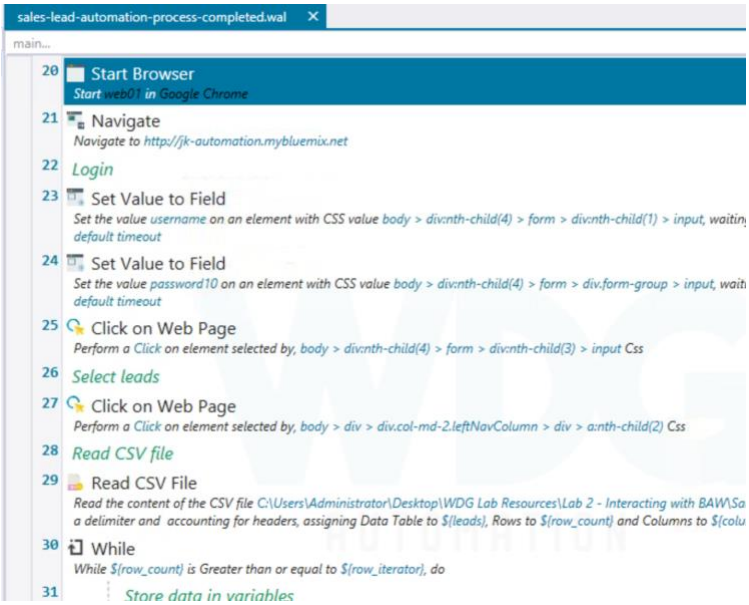
If you just want to run the automation without authoring it first follow these instructions below.

Open completed lab

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



_2. Navigate to *Desktop → IBM RPA Lab Resources → Lab 3 – Launch a BAW process*. Select **sales-lead-automation-process-completed.wal** and click `Open`.



Run the automation

_1. Click the green Start icon form the top toolbar. Alternatively, you can hit F5.

_2. Follow the steps in Test your automation on page 18.