

Lab Guide

IBM RPA Attended Automation

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Hands-on Lab

Version 1.0 for General Use





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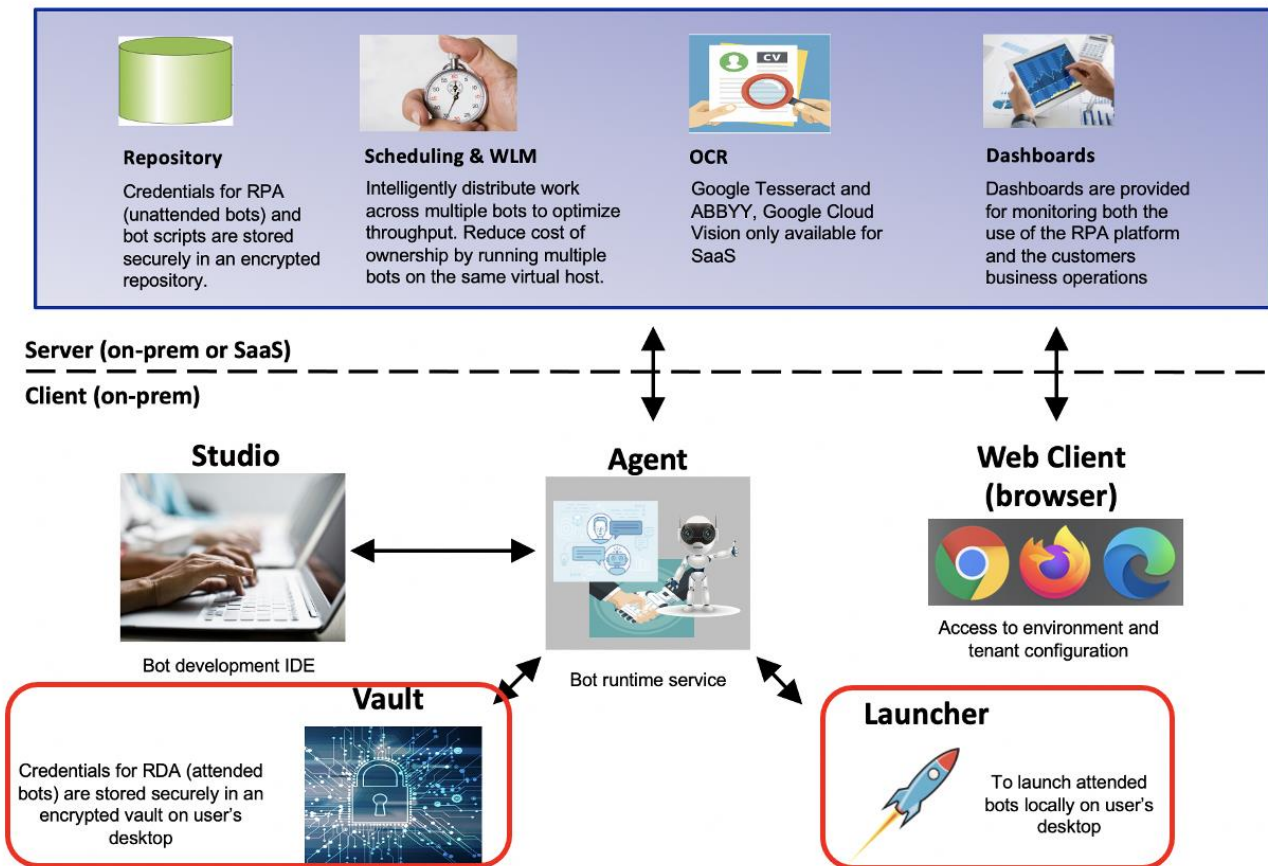


1 Introduction

In this lab you will learn the basics of attended automation with IBM RPA. We will cover the things you need to do in order to prepare your bot for attended usage.

RPA bots can be run in background as scheduled or otherwise triggered – called *unattended* automation – or by business user on-demand in the user's desktop – called *attended* automation. IBM RPA supports attended automation with the Launcher application and with local credential vault.

Multitenant Environment



1.1 Launcher

The Launcher is a client application that can be installed to business user's computer together with the runtime Agent. Business users can run the Launcher and use it to start any bot that tenant administrator has added to user's launcher definitions.



1.2 Local Credential Vault

The local credential vault is an optional component for attended automation, but has been designed to support it. Business users can use the vault to securely set and manage their own user credentials to be used with automations they launch using the launcher.

1.3 Use Case

No real business use case. Just a technical run-through of the steps to schedule a bot.

1.4 Prerequisites


None. You have everything you need in your lab environment. Let's get started!

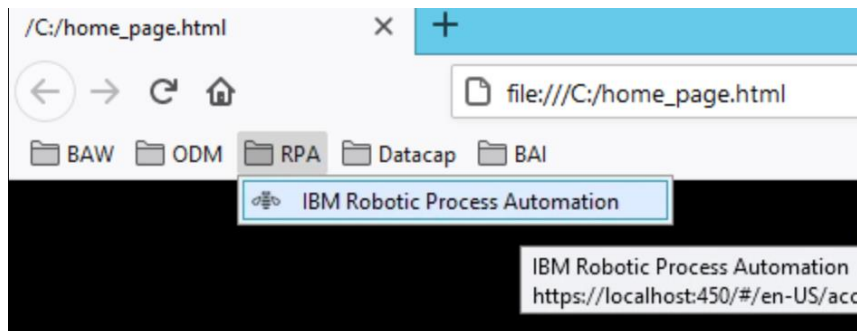


2 Create a vault credential

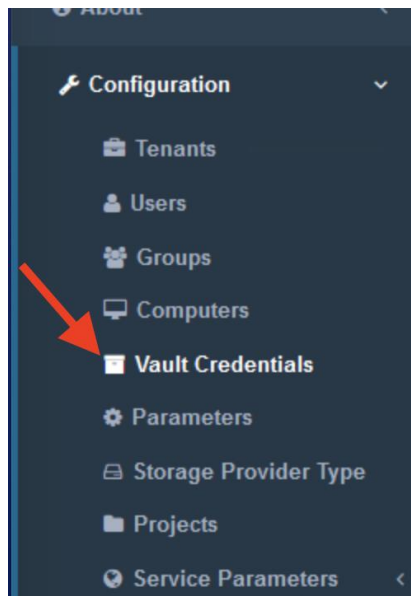
In this lab we're using a script that uses the local credential vault to get the credentials to use when login in to web our sales lead web system.

In order to business user being able to manage the credentials using the local credential vault, tenant administrator needs to declare the credentials to the tenant and add them to a user group.

1. Open Firefox browser ( icon in the Windows task bar) and navigate to your RPA server's web console using the bookmarks menu **RPA → IBM Robotic Process Automation**.



2. Login using the username **admin@ibm.com** and password **passwOrd**. This will open the web console.
3. Collapse the **Configuration** menu on the left-hand side menu bar and select **Vault Credentials**.



4. Click **New Vault Credential**.



Vault Credentials

Vault Credentials

New Vault Credential

Show 10 entries

Key	Creation Date
-----	---------------

Showing 0 to 0 of 0 entries

- Set key to **Sales Leads Web** and click **New Group** to create a new group for the credential.

New Vault Credential

Vault Credentials / New Vault Credential

Key * Sales Leads Web

Description

Groups * New Group

Show advanced options

Cancel Save

- Name the group **Sales Leads** and click add user button to add users to the group.

New Group

Name * Sales Leads

Users

Groups

Computers

Cancel Save

- We have only one user in our demo environment. Make sure to set the **Selected** option to **Yes** for the user and the click **Save**.

Show 10 entries

Search:

Name	Modified By	Modification Date	Email	Selected
Jukka			admin@ibm.com	Yes

Showing 1 to 1 of 1 entries

Previous 1 Next


Save



- Note that you can also add existing groups and computers to the group definition. **Leave them blank** for now and click **Save**.

New Group

Name *

Users 

Groups

Computers


- Finally click **Save** to create new Credential.

New Vault Credential

Vault Credentials / New Vault Credential

Key *

Description

Groups * 

[Show advanced options](#)

- You should now see your new credential in Vault Credentials.

Vault Credentials

Vault Credentials

[New Vault Credential](#)

Show entries Search:

Key	Creation Date	Description	
Sales Leads Web	less than a minute ago		Actions

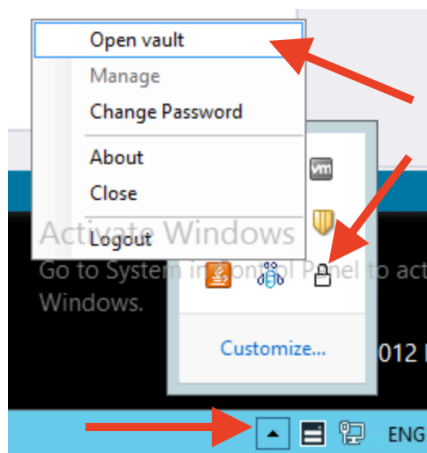
Showing 1 to 1 of 1 entries Previous 1 Next



3 Set local credential vault

Now that you (as an administrator) have created the vault credential to your tenant, you can set and manage it with your local credential store.

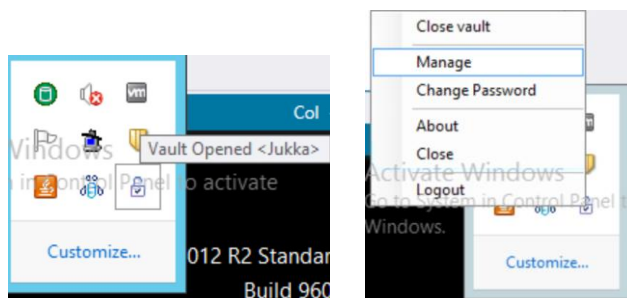
1. Click the **Show hidden icon** from your task bar, **right-click the vault icon** (looks like a lock) and **select Open Vault**.



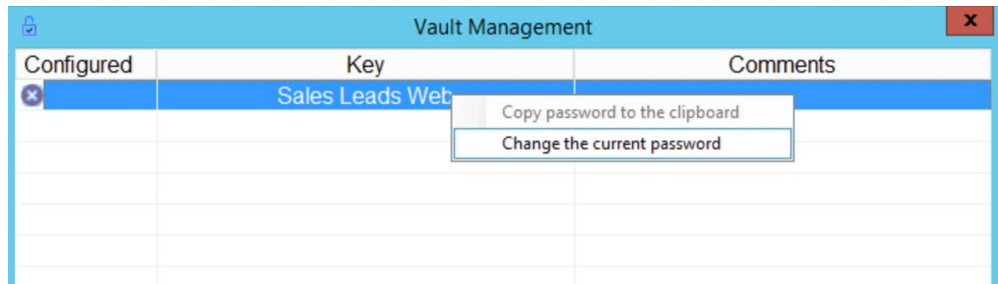
2. When you access your local credential vault for the first time, you need set password to unlock and manage it. **Set your password to whatever you like.**



3. You should now see your local vault opened. **Right-click** it and select **Manage**.



4. The list of your credentials open. As you can see the *Sales Leads Web* credential is not yet configured to your vault. **Right-click** it and select **Change the current password**.



5. Set your credential by typing in the username and the password for it. For this demo use **username** for the User Name field and **password10** as the password. Click **Confirm** to save your credential.

Please enter your new password



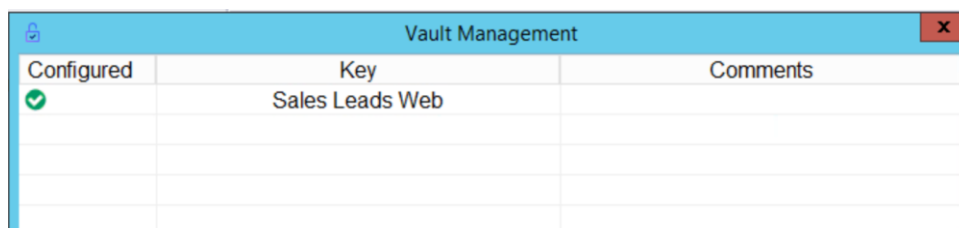
User Name

Password

Re-Type Password

Note. Our demo Sales Leads Web system does really care about the username, but the password needs to be *password10*.

6. You should now see your credential configured to your local vault. **You can close the Vault Management window.**

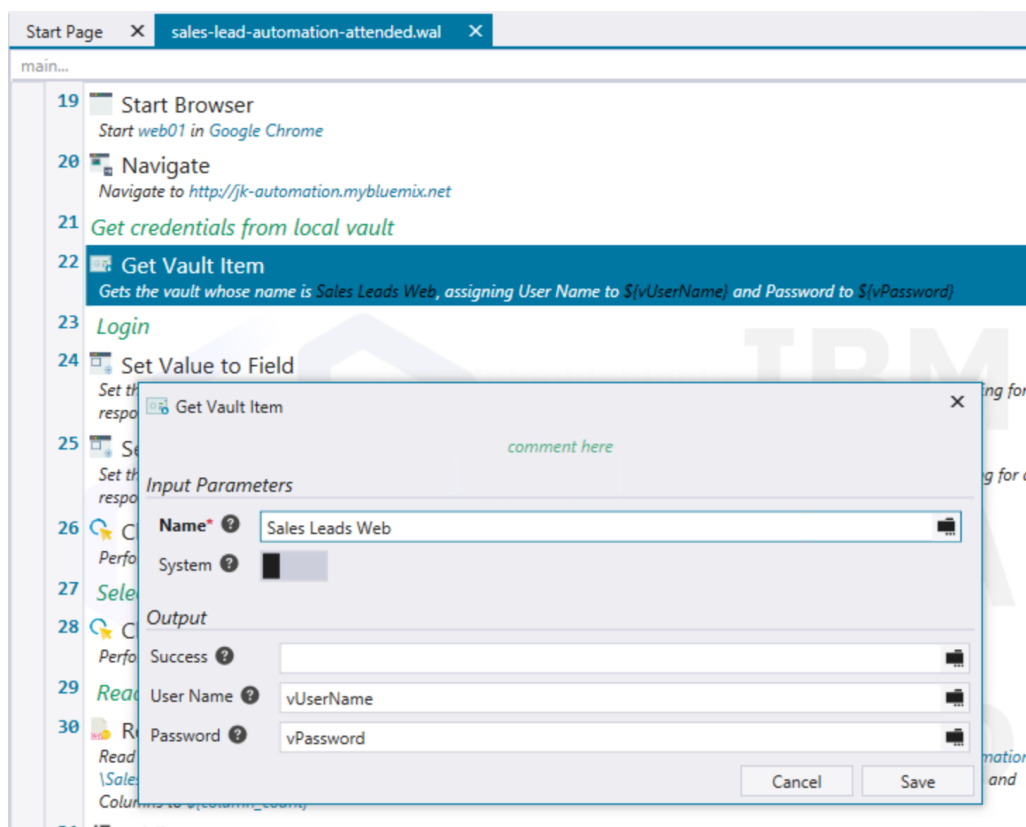




4 Upload your script

We have provided you with a script that uses local vault to get credentials. Open it with the Studio, examine it and then upload it to your RPA server / tenant.

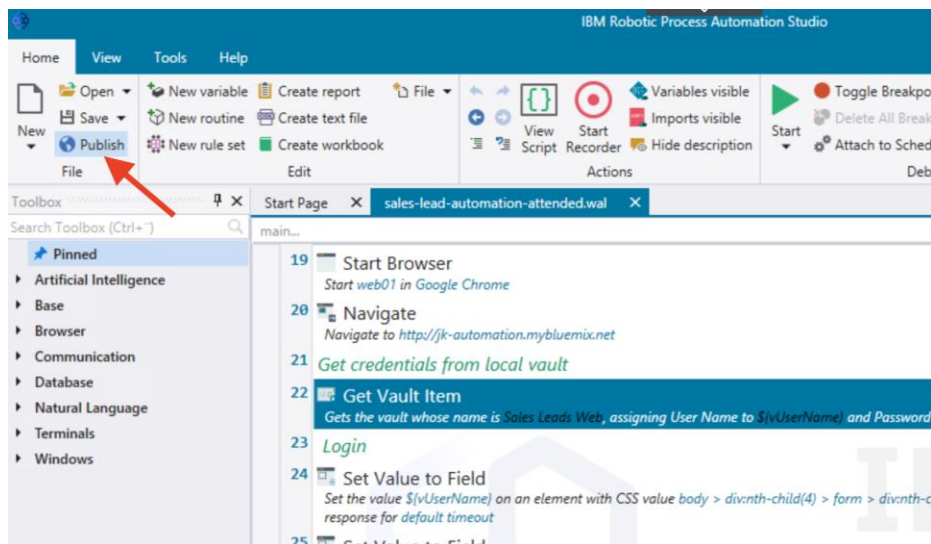
1. In IBM RPA Studio, open script **sales-lead-automation-attended.wal** from the lab folder *C:\Users\Administrator\Desktop\IBM RPA Lab Resources\Lab 6 – IBM RPA Attended Automation*.
2. When the script is open you can examine who we use the local vault. The command that we need to use is **Get Vault Item**. **Double-click to open it.**



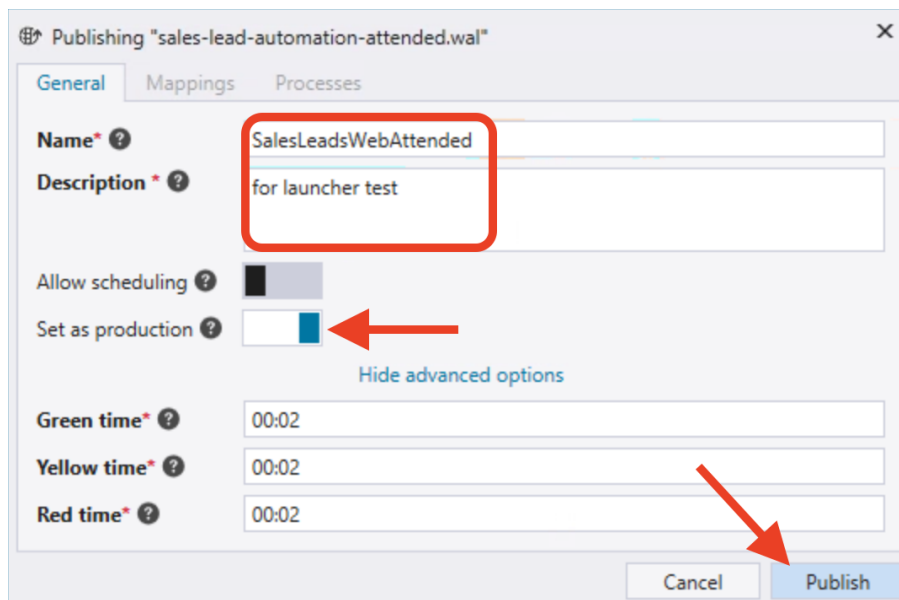
Using the command is simple. Just type in the name of the credential you want to get from the vault and store and store username and password to variables you can then use with your automation script. **Do not change the settings**. Click **Cancel** to close the command configuration.

The System option can be enabled if we want to use the system vault (credentials stored directly to your tenant). System vault is normally used for unattended automation.

3. Next, publish the script to your tenant. Click **Publish** in the Studio toolbar.



4. This will open the Publishing configuration window. Set name to **SalesLeadsWebAttended** since the publishing uses letters and digits only.



Set a description. Notice that there are two options you can enable: **Allow scheduling** and **Set as production**. Obviously, when we want to schedule our bot, we need to enable the first one. The second one is not necessary for scheduling, but when you're uploading a first version for your bot, it's recommended to set it as a production version. *Also, you need to have a production version defined for your script that you want to use for attended automation.* Since, we're not scheduling the bot, **you should enable only Set as production**.

Click **Show Advanced Options**. These additional values can be set, but are optional. Green time represents the optimal execution time for the bot. Yellow time the expected average execution time and the Red time the maximum expected execution time.




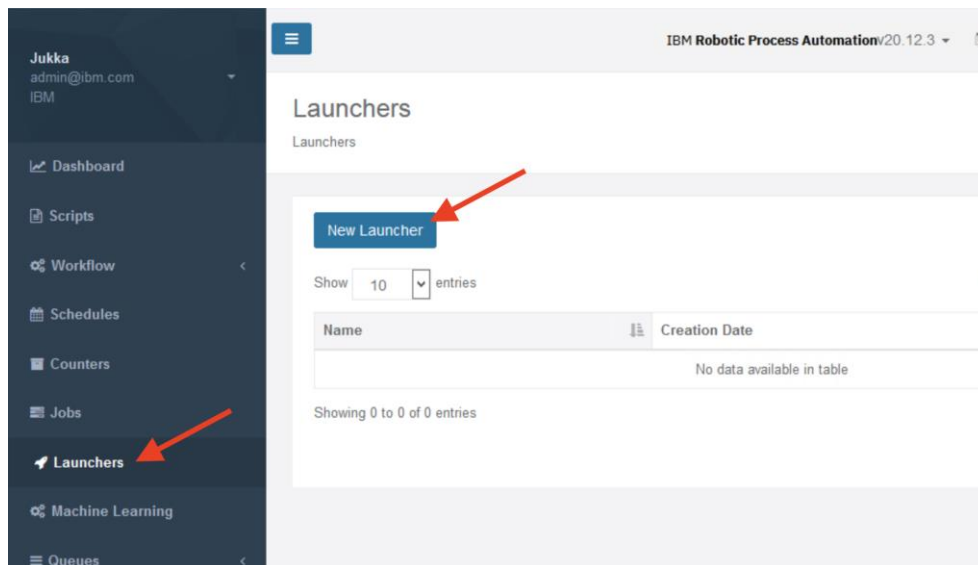
For our test script here, we can leave the advanced options as they are. Click **Publish** to publish the script to your server.



5 Create launcher definition

Launchers are created and managed using the IBM RPA web console.

1. If your tenant web console is not yet opened, open Firefox browser ( icon in the Windows task bar) and navigate to your RPA server's web console using the bookmarks menu **RPA → IBM Robotic Process Automation**. Login using the username **admin@ibm.com** and password **passwOrd**.
2. Select Launchers from the menu and click **New Launcher**.



3. Set **Sales Leads Processing** as name and type in something to Description. Select **Sales Leads** for Groups. Then click **Add Button**.

The form shows the configuration for a new launcher. The 'Name' field is 'Sales Leads Processing', the 'Description' field is 'Bots for sales leads processing', and the 'Groups' field is 'Sales Leads'. The 'Buttons' field is empty, with a rocket icon and the text 'There are not buttons yet.' below it. A red arrow points to the 'Add Button' button. At the bottom, there are 'Cancel' and 'Save' buttons.

Name *	Sales Leads Processing
Description *	Bots for sales leads processing
Groups *	Sales Leads ✕
Buttons *	

There are not buttons yet.

→ Add Button

Cancel Save



- The button configuration window opens. A button within a launcher represents a bot to launch. One launcher can have several buttons defined.

Set **Sales Lead Web** for *Button Caption*. Also type in something to *Button Description*. For *Script*, select the bot that you just published – **SalesLeadsWebAttended**. Click **Save**.

Button configuration window:

Button Caption *: Sales Lead Web

Button Description *: Inserts sales leads from local csv file to sales leads web system

Script *: SalesLeadsWebAttended

Buttons: Cancel Save

- Finally click **Save** to save your launcher configuration.

New Launcher

Launchers / New Launcher

New Launcher configuration window:

Name *: Sales Leads Processing

Description *: Bots for sales leads processing

Groups *: Sales Leads

Buttons *: Add Button

Icon	Button Caption	Actions
	Sales Lead Web	

Buttons: Cancel Save

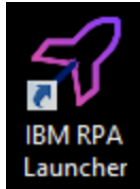
You are now ready to use your launcher!



6 Run your attended bot using the Launcher

Business users can access their launchers using the Launcher application.

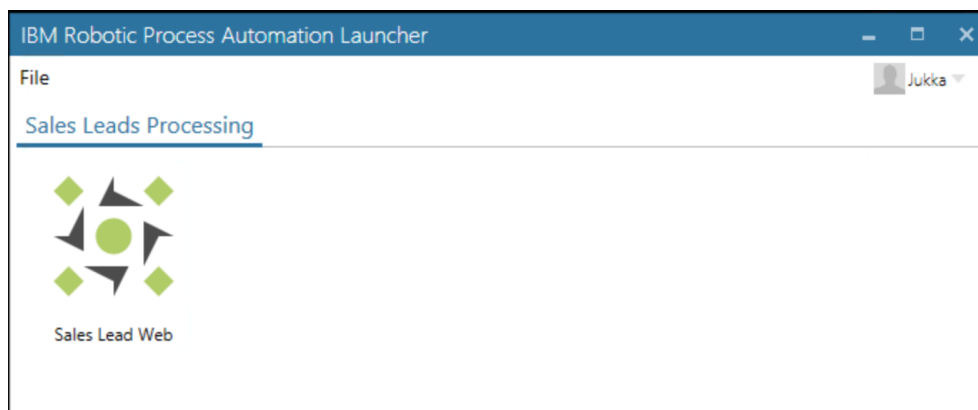
1. Start the Launcher application by double-clicking the Launcher shortcut on the desktop.



2. Since you're still logged in with the Studio, you do not need to login. If your login has expired use username **admin@ibm.com** and password **passwOrd** to login.

You now have access to your newly defined Sales Leads Processing launcher that has one button defined – to launch Sales Lead Web bot.

Note! If you cannot see the launcher, open File menu from the launcher window and select **Refresh Launchers** until you can see the launcher.



3. To run the bot, double-click the **Sales Lead Web icon in the launcher window** and wait your bot to run. It might take a couple of seconds for your bot to start.

Nicely done! This concludes the lab.