Appian Applied RPA

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Senior Technical Instructor

Class Introduction

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Class Expectations

- **Schedule:** 9:00 AM - 5:00 PM // Three Days, 1 hour for lunch, 10 - 15 minutes for breaks
- **Class Structure:** Lecture, Demos, Discussion, Exercises, Quizzes
- **Expectations:** Ask questions, Be attentive, Complete exercises

Course Objectives

- Identify the purpose and use case of Appian RPA robotic tasks
- Explain how to plan and estimate Appian RPA into applications
- Create robotic tasks and utilize them within an Appian application
- Identify common exception handling methods for Appian RPA

Training Agenda

- Introduction to Appian RPA
- Architecture
- Planning RPA Projects and Use Cases
- How to Estimate your RPA Project
- Requirements
- Agents and Robots
- Robotic Tasks
- Building Robotic Tasks with the Appian Task Recorder
- Create New Actions to Extract and Log Results
- Exception Handling
- Items Actions
- Executions, Testing and Debugging
- Windows Automation, Keyboard, Image Recognition and Operating System Actions
- Excel Actions
- Execute Robotic Tasks using Process Model RPA Smart Service
- Troubleshooting RPA
- Bonus: RPA with AI Skills
- Bonus: Service Accounts and API Keys
- Bonus: Connected System and Integration for Appian RPA

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Course Completion Requirements

- Be present and engaged throughout training
- Complete all assigned exercises and quizzes
- Satisfy course objectives

A **Completion Certificate** will be issued when all requirements have been met.

Student Introductions

- Name
- Role or Position
- Experience with Appian RPA, RPA, Application Design, BPM, Agile Dev, Coding
- Topics of interest for the course
- Dream Vacation & Favorite Food

Academy Plus
Applied RPA Course

- Instructor Led Courses
- Secure
- Evergreen content
- Accessible from class environment
- Lessons with Practical Examples
- PDF Slide Deck
- Exercise Prompts
- Exercise Solutions
- Optional Bonus Lessons
- Optional Bonus Exercises
- Course Surveys
- Can be referenced after the class is over

https://academy-plus.appiancloud.com/suite/sites/academy-plus

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Lesson 1

Introduction to Appian RPA

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Challenges We Hear

Drive operational efficiency

Streamline compliance

Unleash digital innovation

Improve customer/ employee experience

Modernize legacy systems

Accelerate time-to-market

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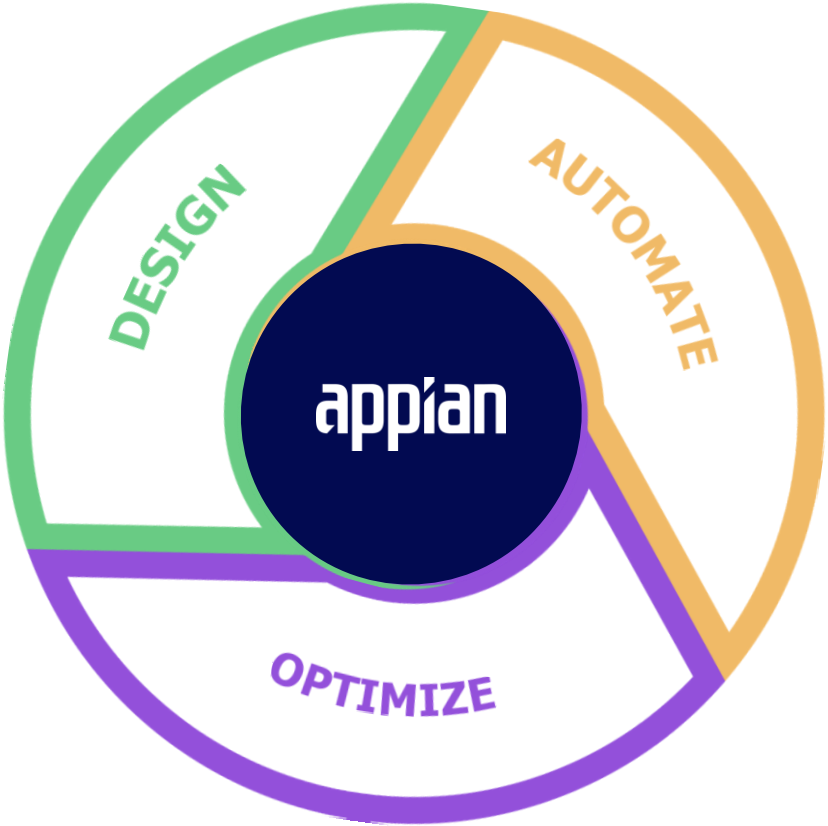
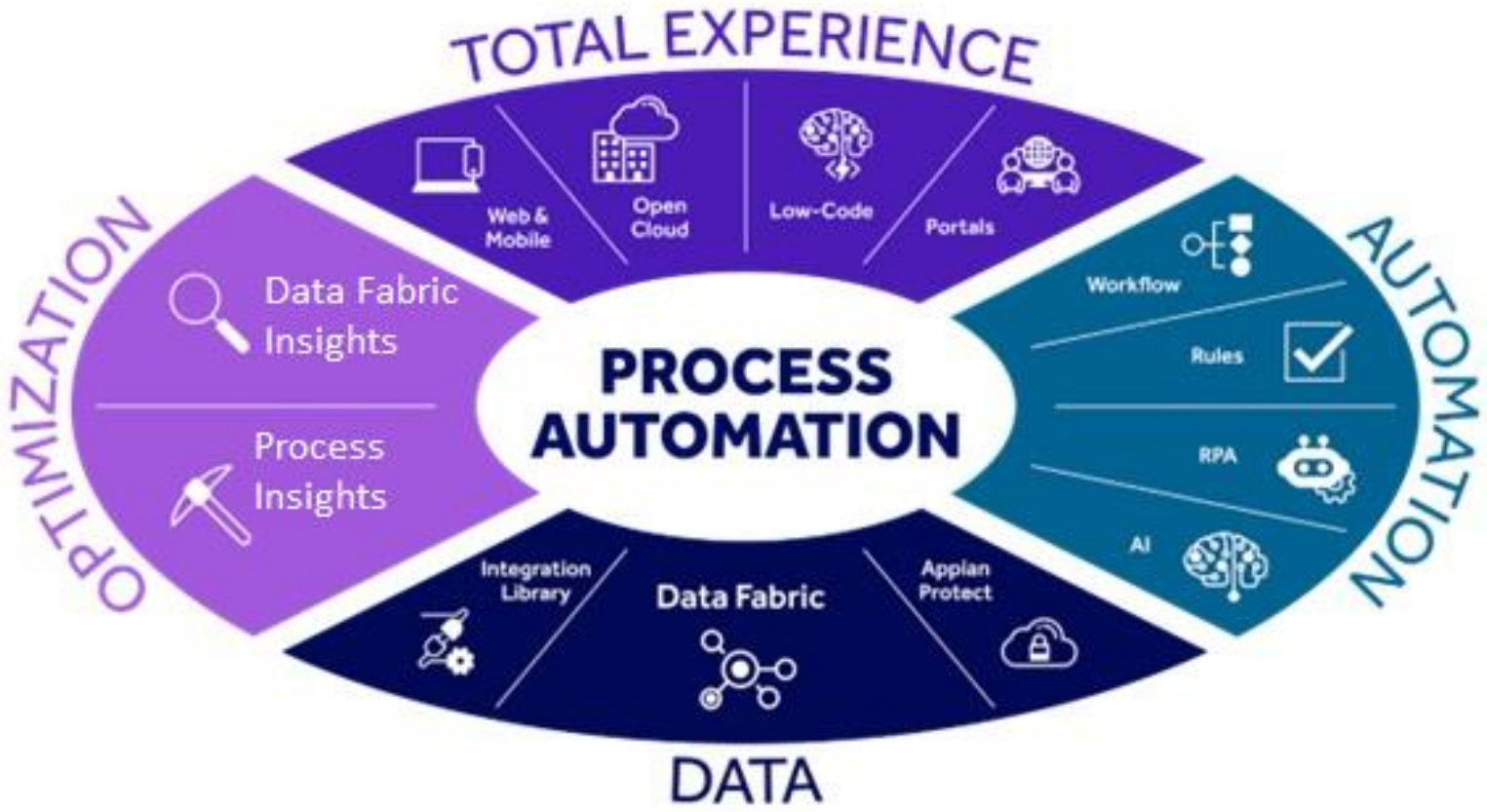
Deliver End-to-End Process Automation



Unleash digital innovation with **Low-code Design.**

Automate end-to-end processes with a **Unified Platform.**

Optimize business efficiency with **Process Mining.**


TOTAL EXPERIENCE
Web & Mobile
Open Cloud
Low-Code
Portals
OPTIMIZATION
Data Fabric Insights
Process Insights
PROCESS AUTOMATION
AUTOMATION
Workflow
Rules
RPA
AI
DATA
Integration Library
Data Fabric
Appian Protect

AVIVA

- **9x faster** customer service
- **40%** cost savings
- **22 systems** consolidated

What is Automation?

Automation describes the shift of tasks from humans to technology applications that are better suited to handle repetitive, time-consuming work.

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What is RPA?

Robotic Process Automation (RPA) helps automate repetitive tasks of business processes thru software programming.

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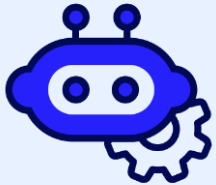
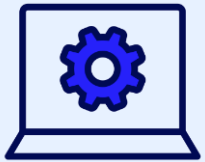
Robotic Process Automation

RPA

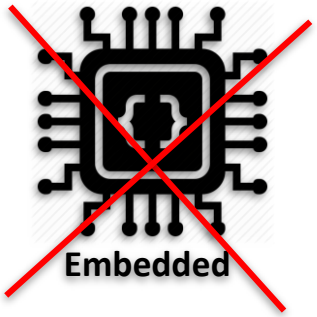


Automate repetitive tasks



Integrate with apps without APIS

RPA Use Cases



RPA Use Case

Human as the Integrator

System 1

System 2

RPA Use Case

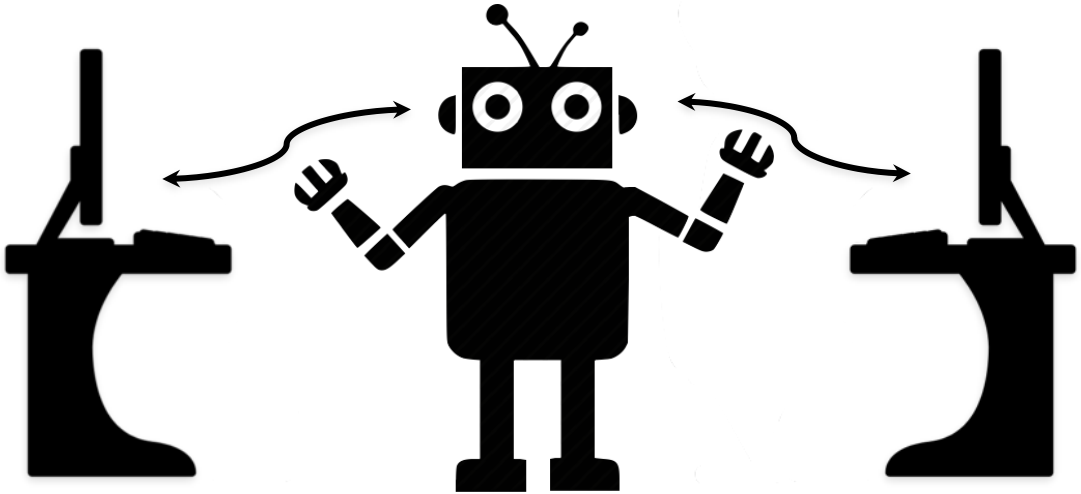
Human as the Integrator

System 1

System 2

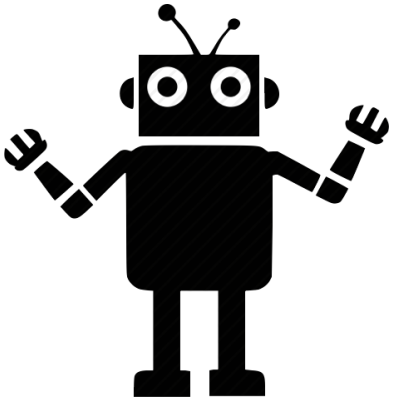
RPA Solution

Robotic Task as the Integrator



RPA Solution

Robotic Tasks



Appian RPA

To do every Friday evening:

1) Open the inventory system
2) Find all incomplete transactions from the current week
3) Copy and paste their details into an Excel sheet
4) Find all transactions above our threshold
5) Copy and paste their details into a new tab of this Excel sheet
6) Send this Excel sheet to the inventory specialists
7) Find all items that are below a threshold count
8) For each of these items initiate on order process

Managing Multiple RPA Products

Appian RPA

Appian RPA is a cloud-native technology for robotic task automation that **increases efficiency**, **reduces errors**, and **lowers costs**. Appian RPA is part of Appian's full-stack automation, which combines RPA, workflow, decision rules, AI, and case management, giving you the right technology for the right use case.

Powerful Governance

Secure Cloud RPA

Dynamic Exception Handling

Low Code or Robust Java Development

FedRAMP

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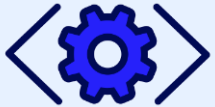
Appian RPA

Build robotic tasks fast with low-code design



Scale with centrally managed and unified automation

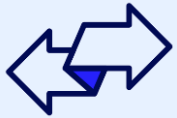
Deploy without limits with unlimited bots across environments

Appian RPA Key Capabilities

Low-code RPA

Powerful governance

Secure Cloud



Dynamic exception handling

Deployment flexibility

Detailed audit trails

Intelligence image recognition

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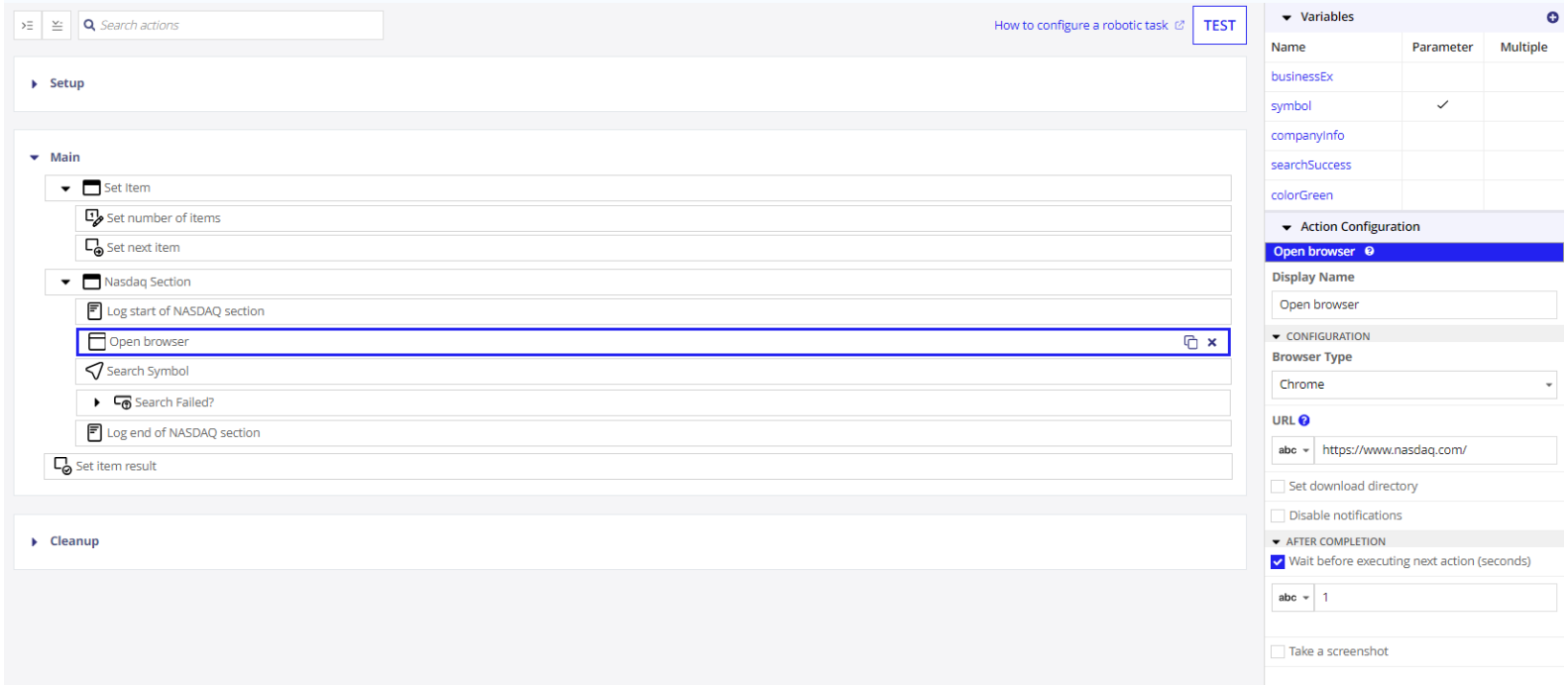
Designer

Web-based, Low-code with Chrome



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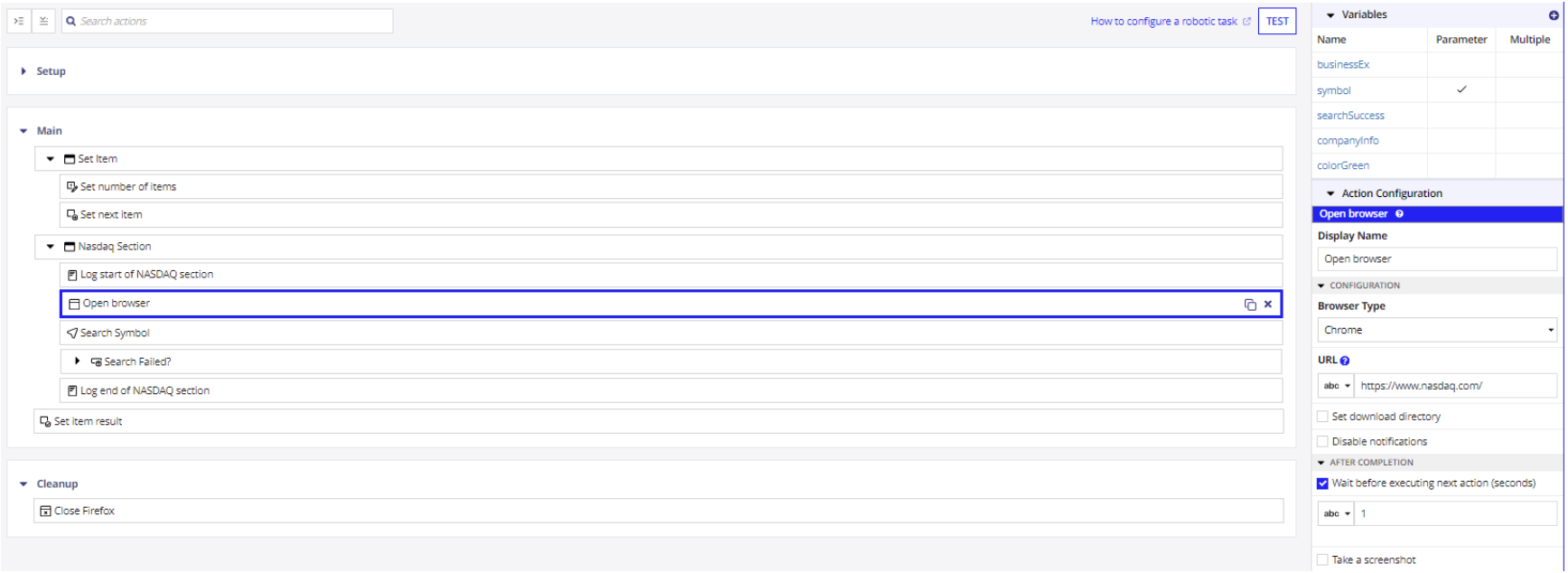
RPA Console

Web-based, Low-code with Chrome



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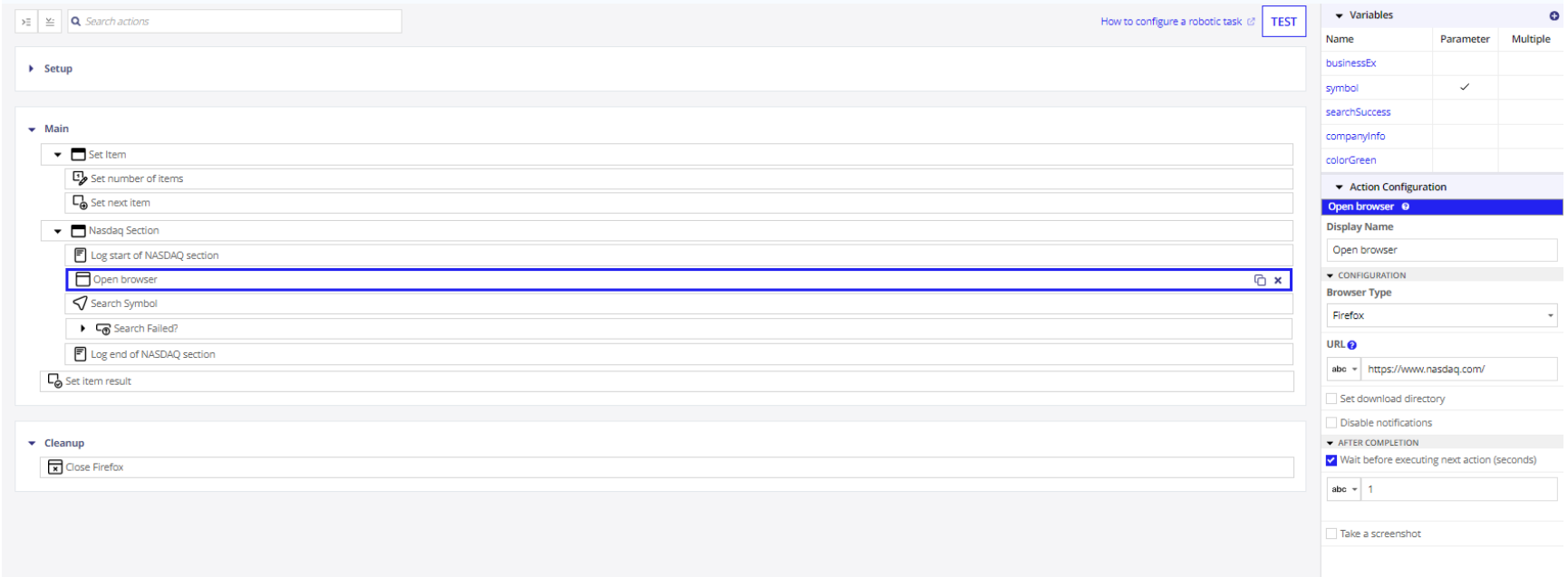
Designer

Web-based, Low-code Design with Firefox



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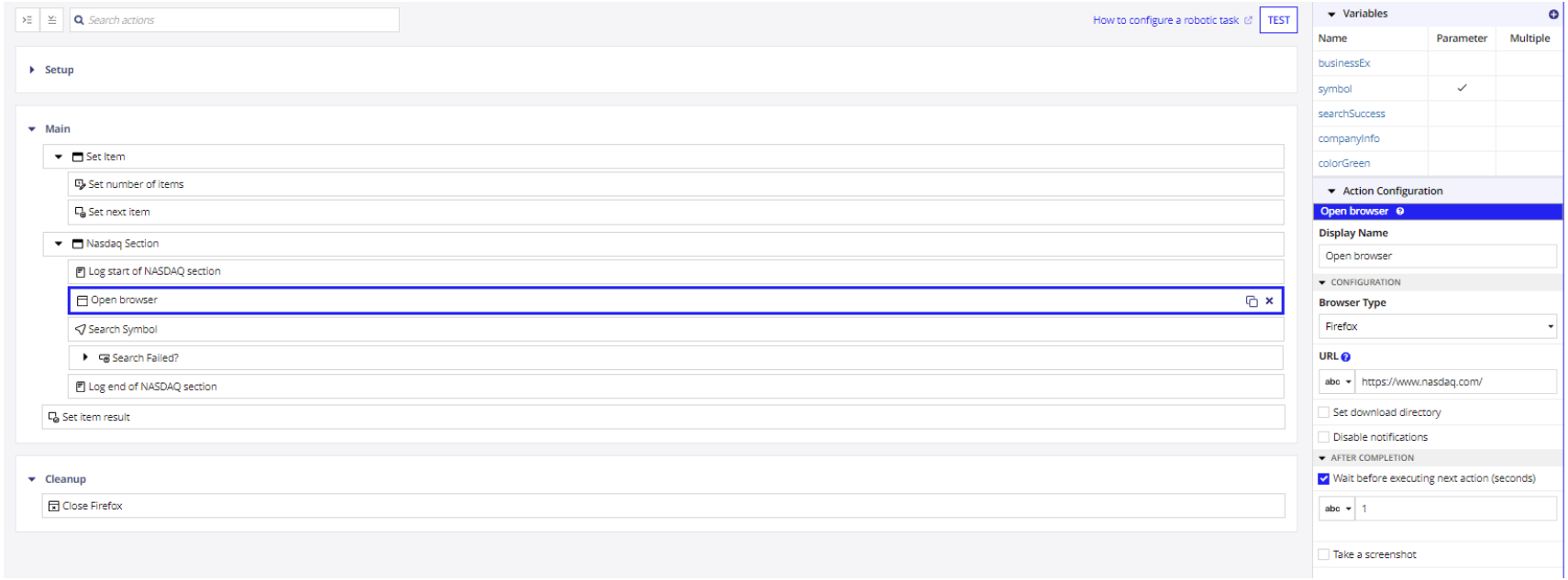
RPA Console

Web-based, Low-code Design with Firefox



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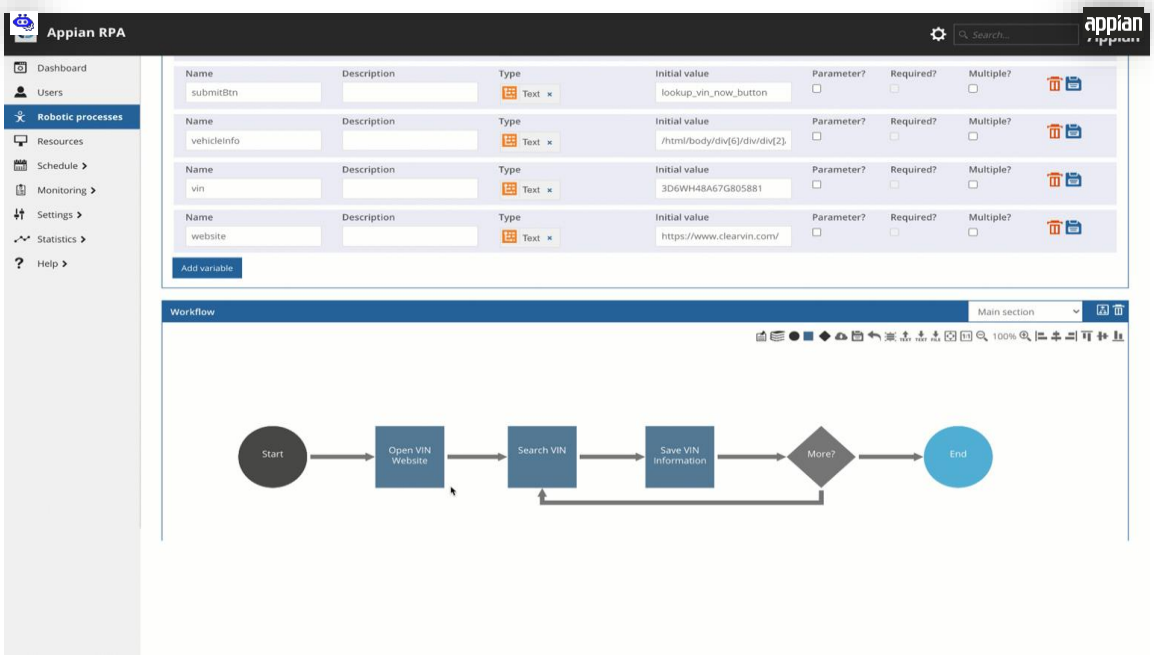
Web-based, Low-code

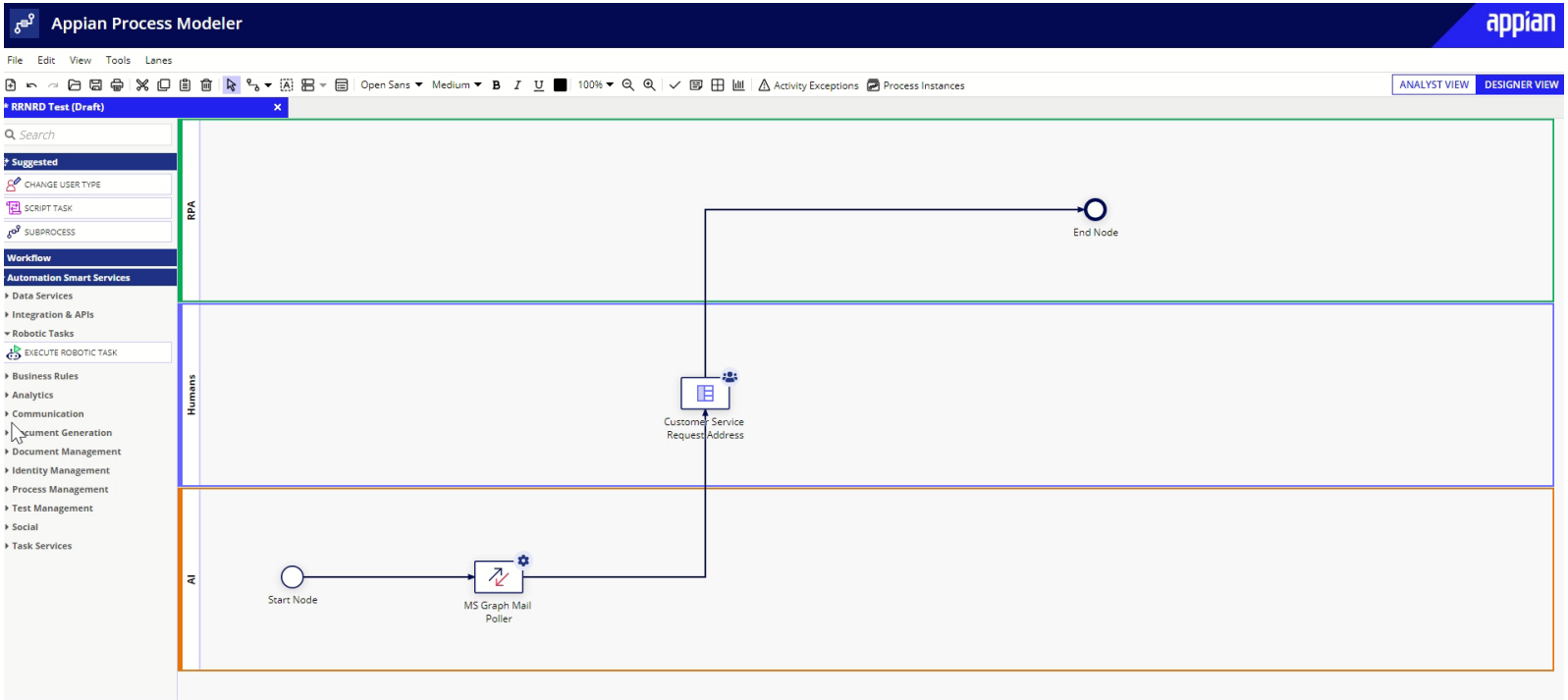
Previous Designer 8.0



We've come a long way!

Add Robotic Tasks

Any Business Process



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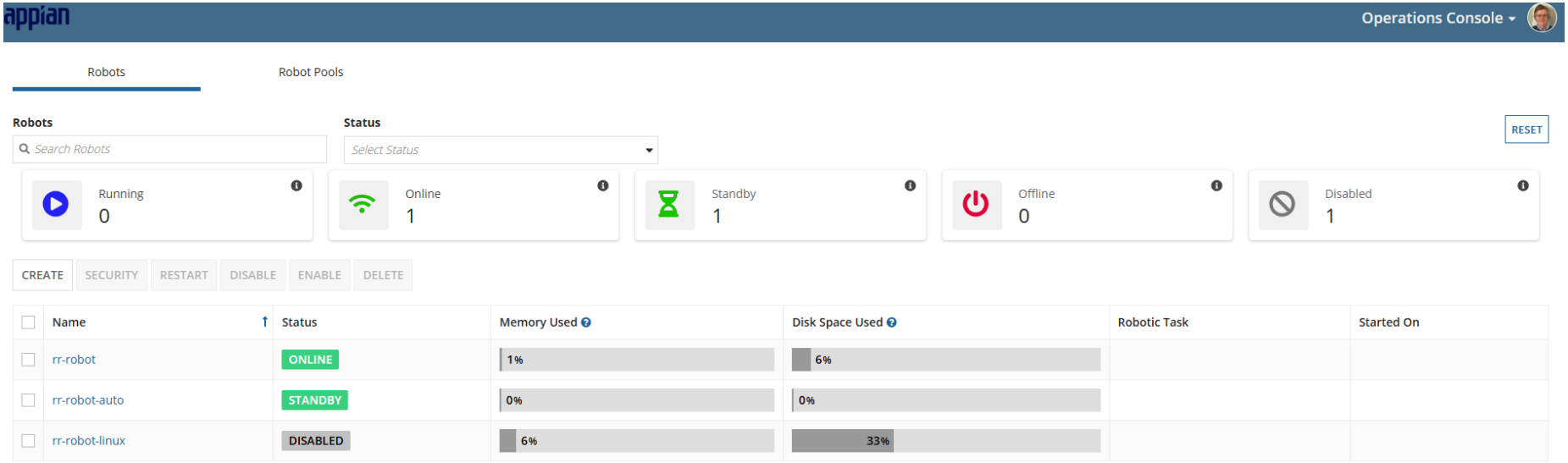
Operations Console



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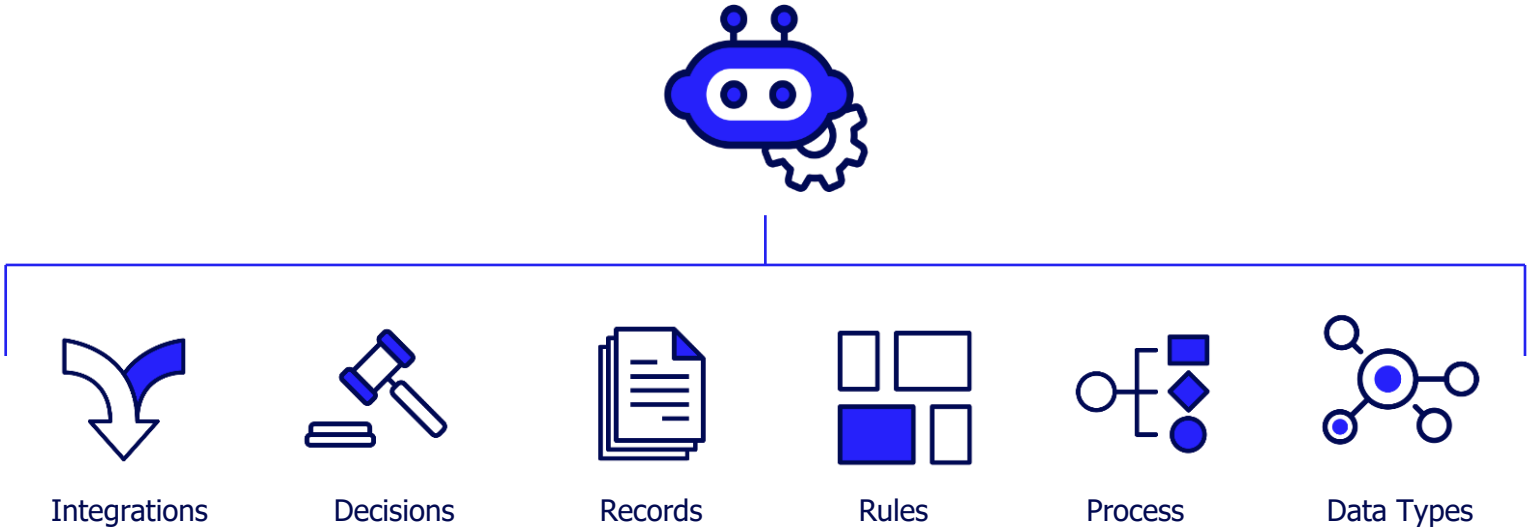
Robotic Tasks

Have Access to the Full Power of Appian



Appian RPA Training Credentials

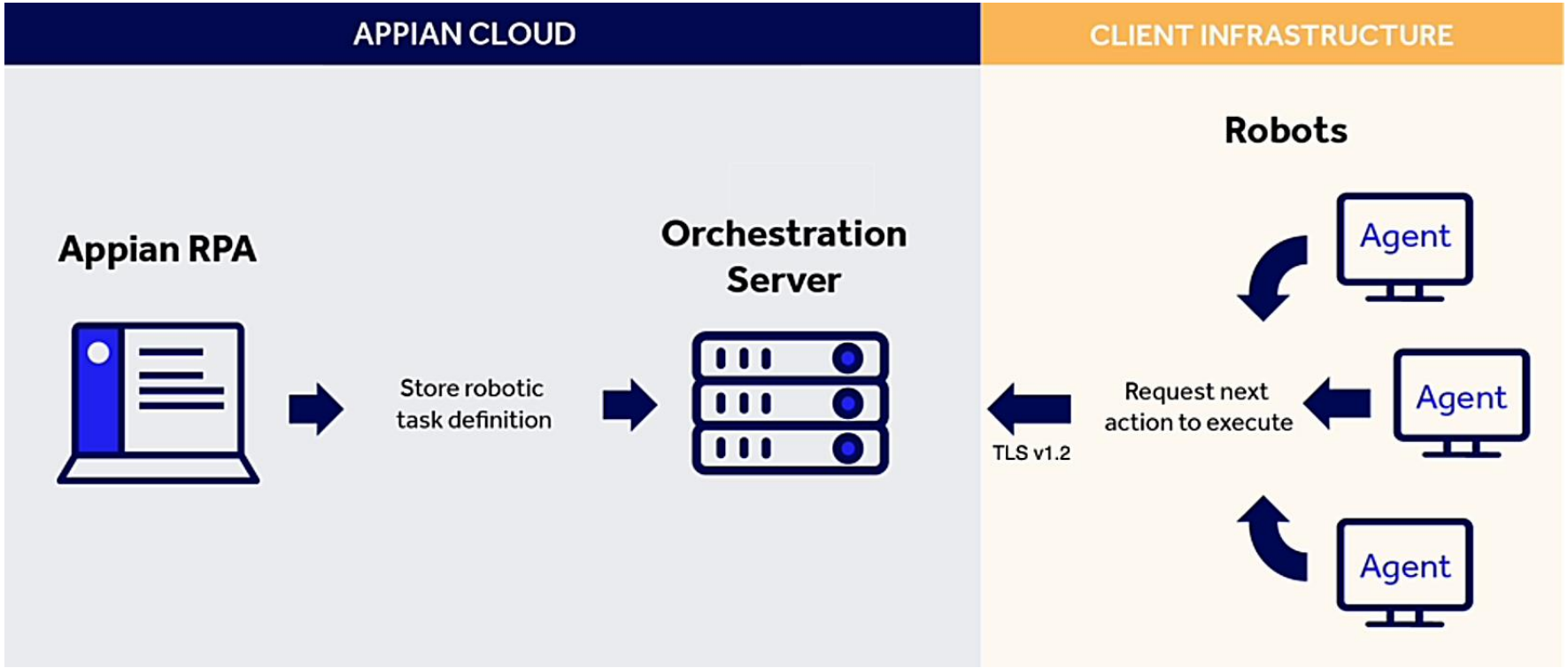
- Cloud URL: Your instructor will provide this.
- Username: Your Email Address

  Example: randy.richeson@appian.com
- Password: Appian2024

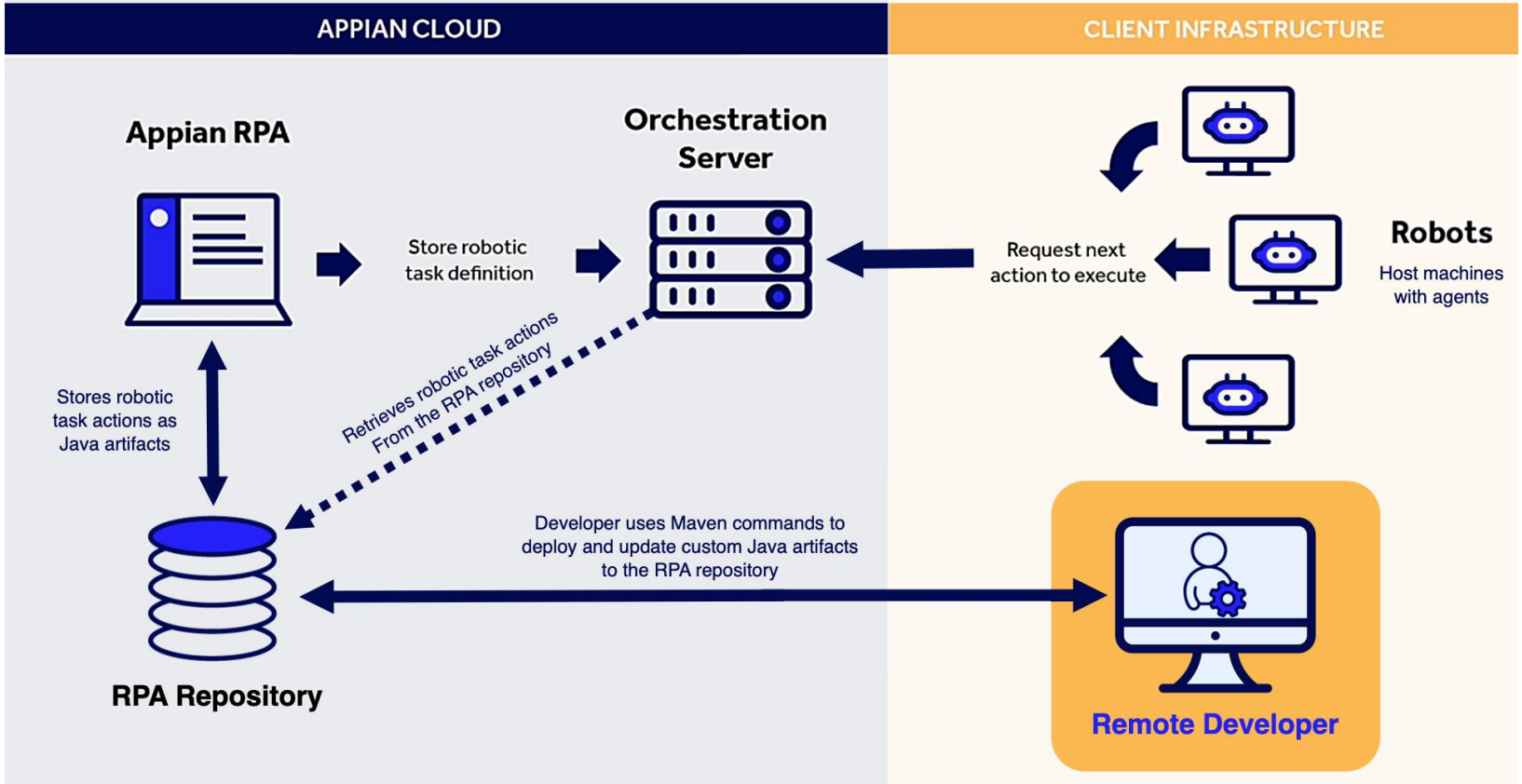
Lesson 2

Architecture

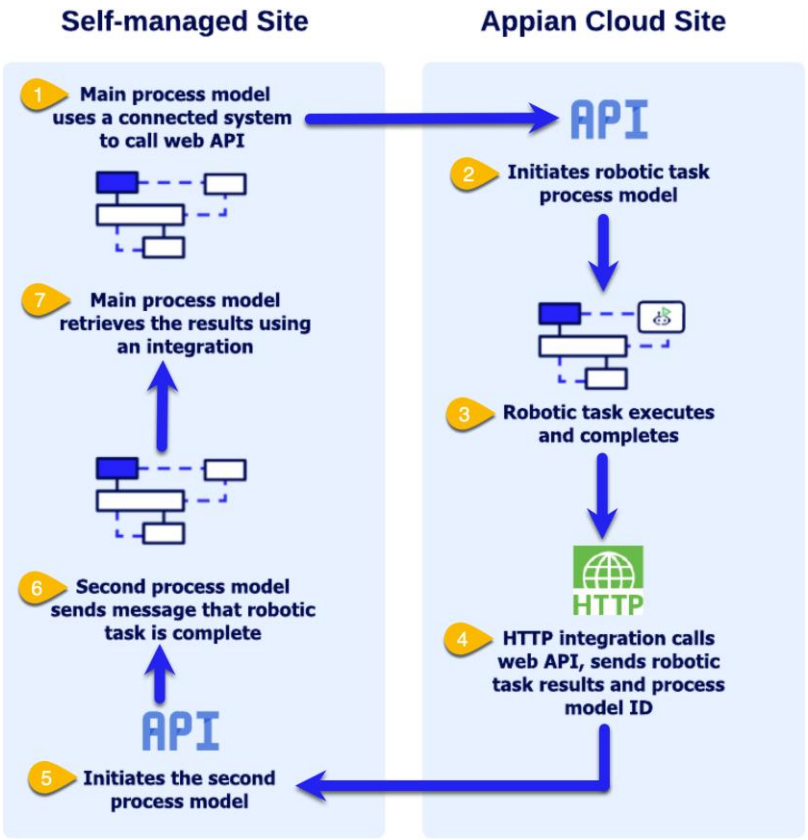
How does Appian RPA work?



Custome Code Development



Hybrid Configuration



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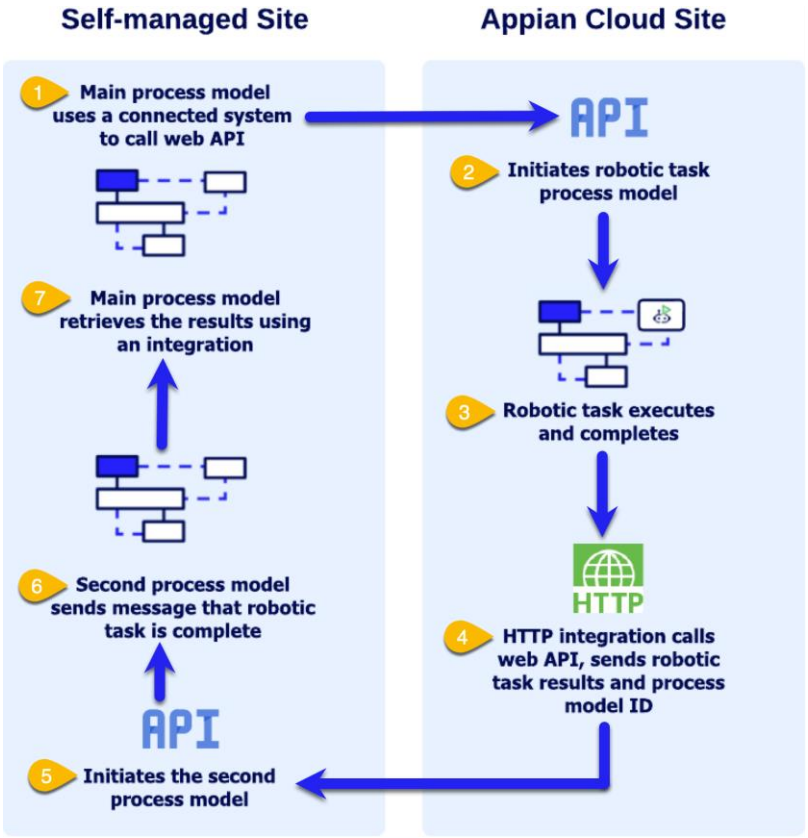
Hybrid Configuration



Self-managed customers can now self-host Appian RPA as a containerized application running on Kubernetes

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Appian RPA Roles

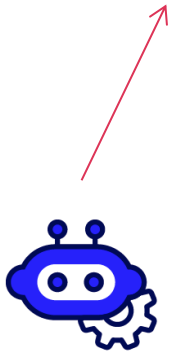
- Administrator has access to every screen in the console and can modify all permissions. Can create new robotic tasks and have access to every setting available in the robotic task configuration. Can set up and run all available robotic tasks.

- Developer can build robotic tasks in the console, including modifying permissions for the robotic tasks and robots they can access. Have full access to the settings in the robotic task configuration. Cannot grant permissions to users or change some console settings for things like repositories.

- Operations Manager have limited access and actions in the Appian RPA Console. Cannot create or edit robotic tasks, or users. Can execute robotic tasks, monitor the execution, and view results. Can also create robots using the Operations Console. This role serves as operational support through routine troubleshooting.

Appian Group-Based Rolemaps

- Administrator
- Editor
- Viewer
- Initiator
- Deny



Robotic Task Security

Tip: To start a robotic task, basic users must have at least initiator rights. Learn more

Name

NRD_Example

User or Group	Permission Level	
Default (All Other Users)	No Access	
NRD Administrators	Administrator	✕
NRD Users	Viewer	✕

Add Users or Groups

CANCEL SAVE CHANGES

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Lesson 3

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Planning RPA Projects and Use Cases

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What is an Excellent Fit for Robotic Tasks?

- Repetitive: Tasks repeat a predefined workflow on the interface level
- **High volume: Tasks with high volumes that increase your ROI**
- Rule-based: Tasks that must be coded using rules
- Scheduled: Tasks are executed at regular intervals
- APIs: Tasks that are too costly and complicated to automate with APIs

Common Business Use Cases

- Use Appian RPA as a Temporary Solution to Go Live on Time
- Appian RPA vs. Out-Of-Scope Integrations
- Use Existing Business Logic With Appian RPA
- Showing ROI by Using Appian on a Trial Basis
- Convert Documents to PDF Files Using Appian RPA
- Use Appian RPA as Access Proxies

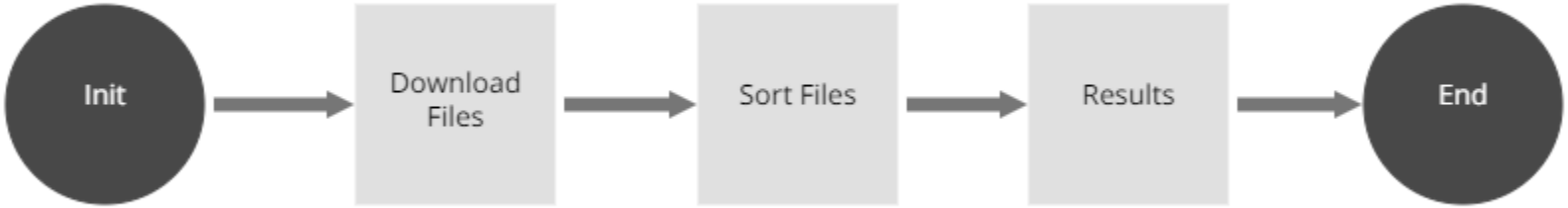
Non-RPA Use Cases

- Simple REST integration and Web API are more appropriate
- Tasks that require dynamic judgement
- Tasks that require highly trained human skills
- Document classification
- Email classification
- Extracting data from PDFs

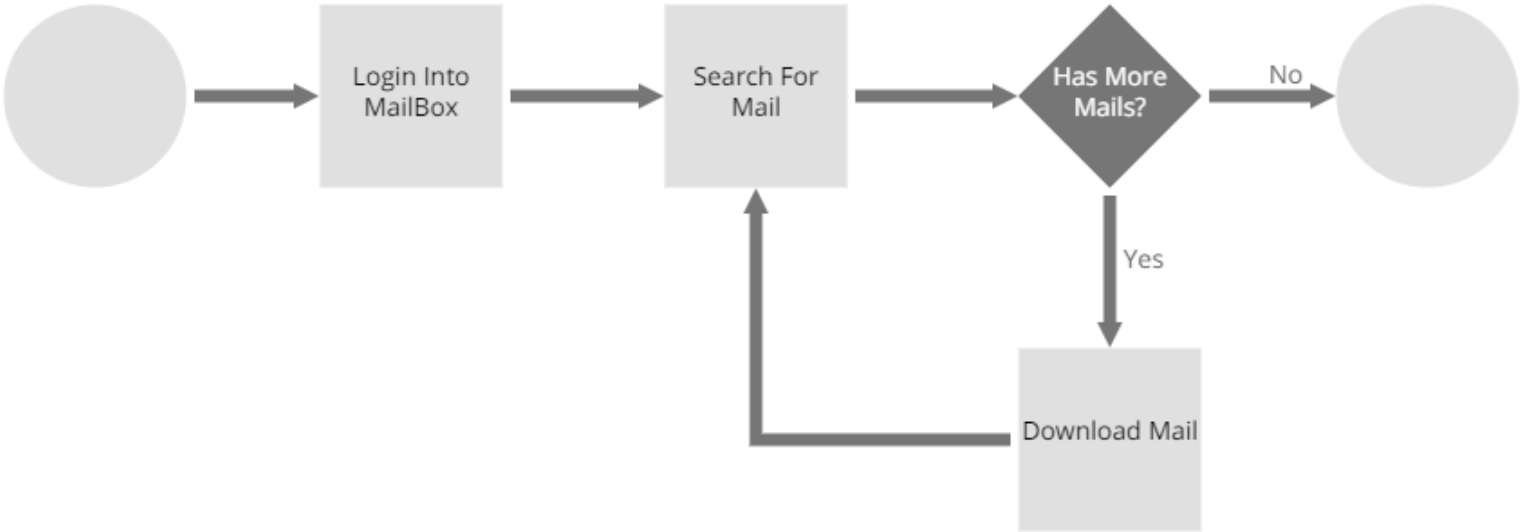
Good First Proposal Example

- Purpose
- Scope of activity
- SLA and schedules to carry out execution
- Systems involved
- Credentials
- Type of execution
- Input
- Output

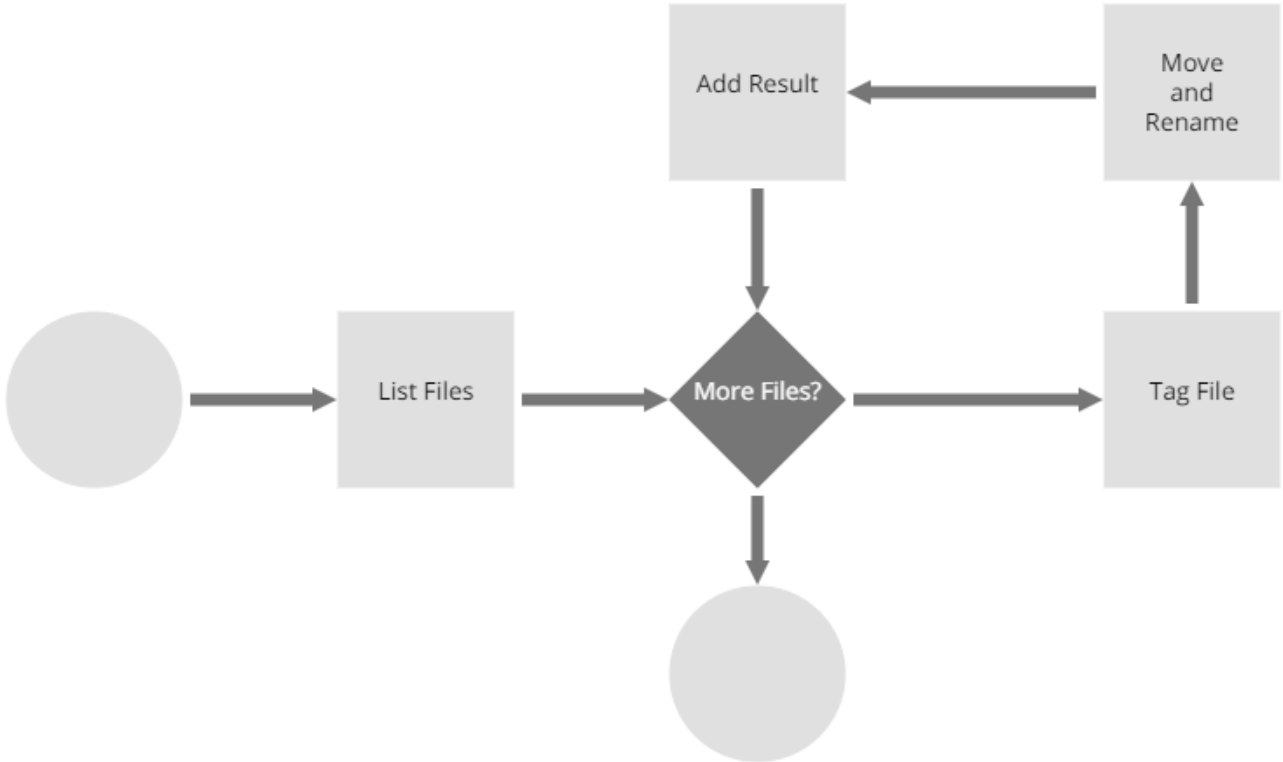
Workflow and Process



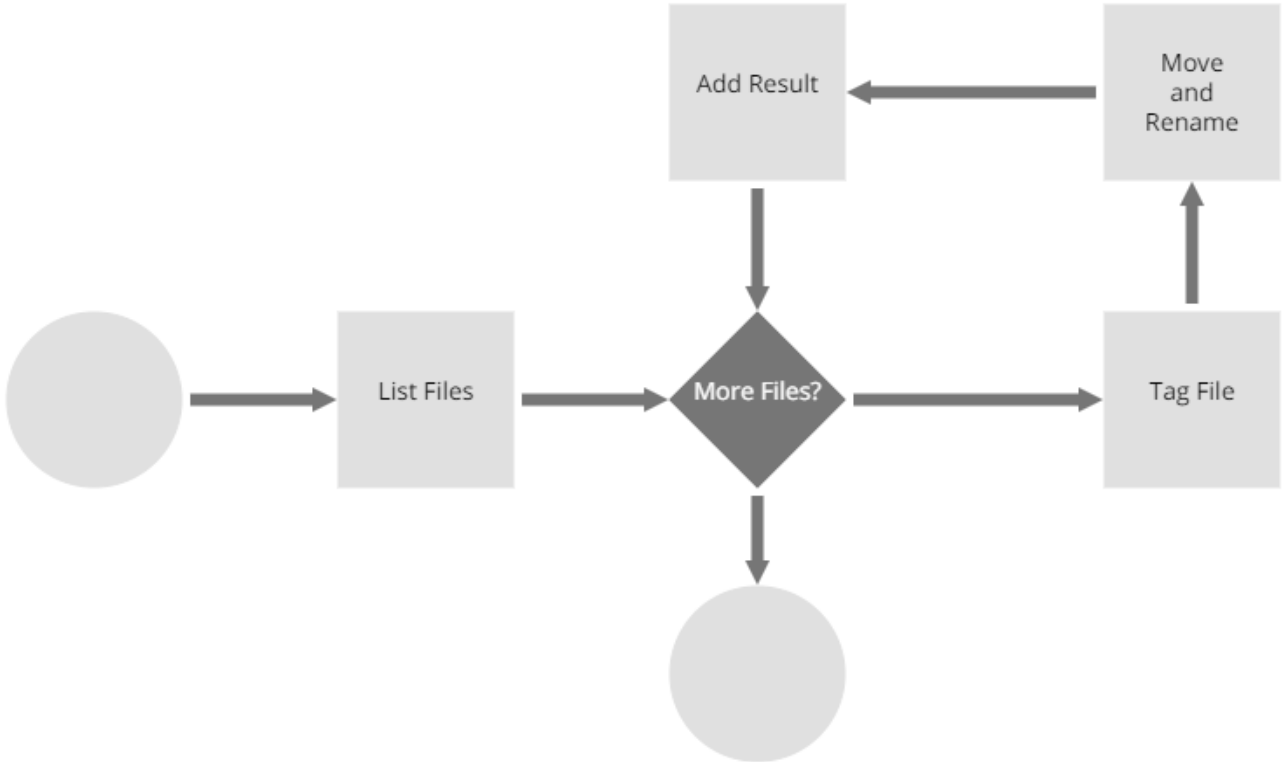
Download Files Workflow



Sort Files Workflow



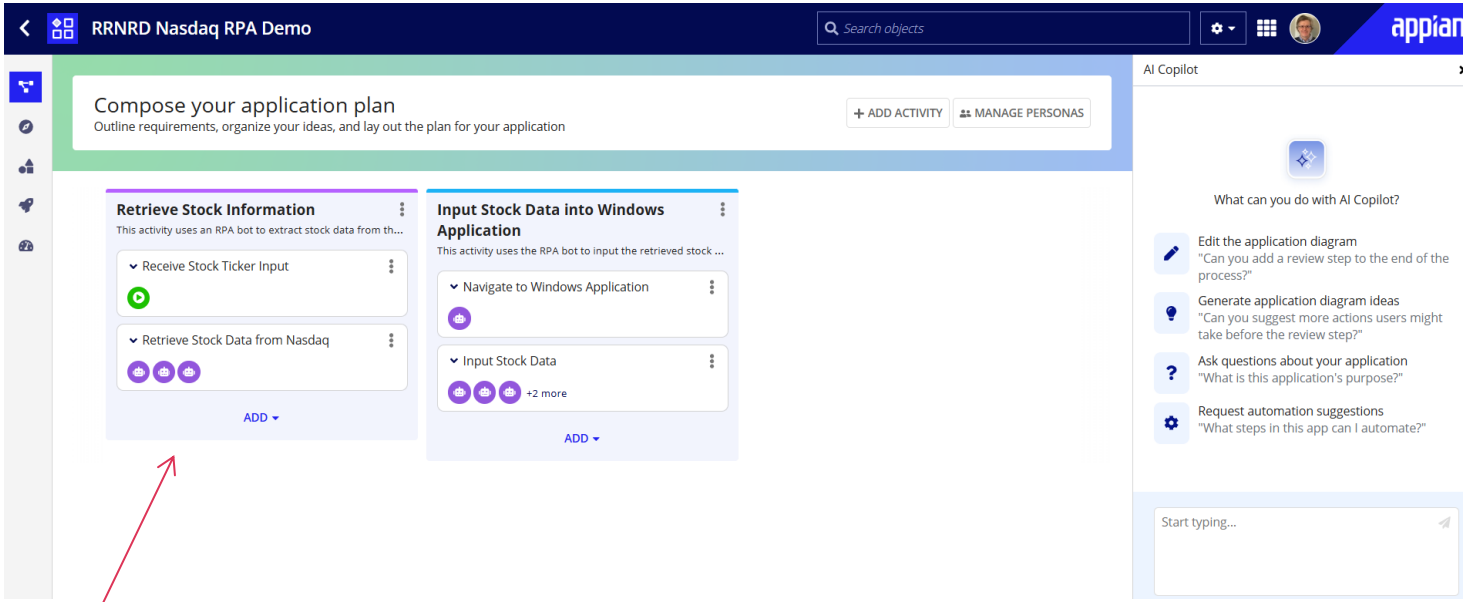
Sort Files Workflow



Appian RPA Use Cases

- Assets Management
- Real Estate Payables
- Issuing of Credit Cards
- Insurance Supplier Payments
- Banking On-Boarding

Appian AI Copilot



The Appian AI Copilot can help plan your use case in 24.4 !

Lesson 4

How to Estimate RPA Applications

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How to Estimate RPA Applications

Gather Information

- Learn As Much Possible About the Process
- Ask About Every Process Detail
- Inquire about Important Automation Characteristics
- Find Out about Each System
- Collect Every Document Possible for the Process while Corroborating it with the Client
- Consider More Subjective Parameters

How to Estimate RPA Applications

Appian RPA Project Estimation Guide

This document describes the most important factors when estimating the level of effort for an Appian RPA project.

This document is divided into two parts: 1) how to assess the complexity of a development, and 2) factors to be taken into account that may affect the calculation of this estimate.

Development complexity	Impact to estimation
Complexity of the application to automate	High
Conditions, decisions and exceptions	High
Number of Windows	Medium
Number of fields	Low

Tips/risks in estimating	Impact to estimation
Application Stability	High
Level of detail	High
Availability of data and environments	Medium
Use of subtasks	Low
Application Reliability	Low

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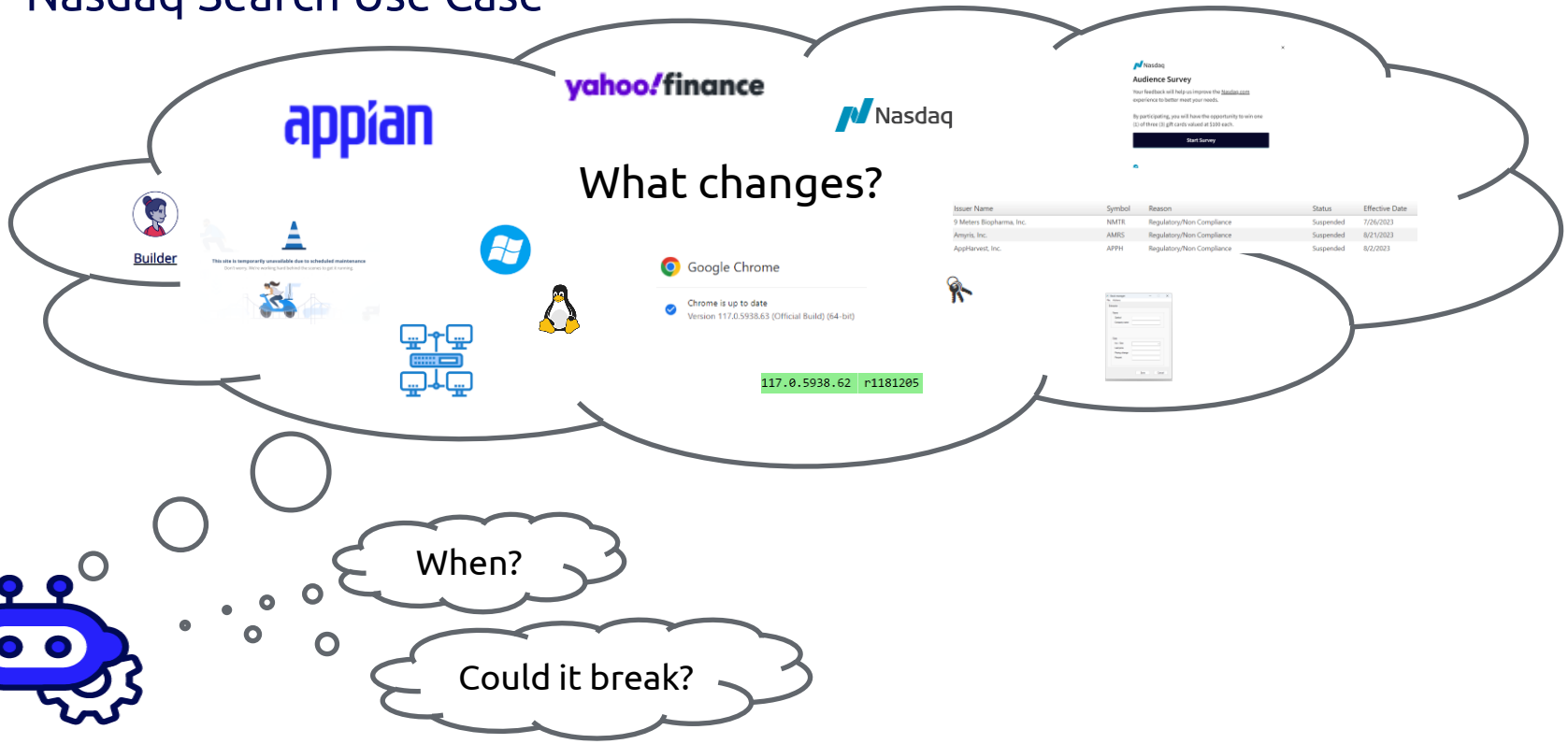
Estimating

Nasdaq Search Use Case



Lesson 5

Requirements

Class Exercise Requirements

- Appian Cloud Environment with Appian RPA
- A Developer Machine
- Google Chrome
- Host Machine

Lesson 6

Agents and Robots

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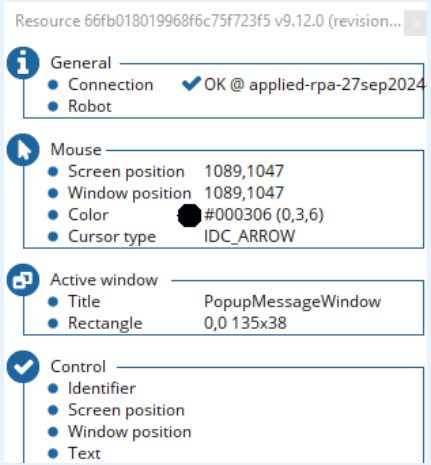
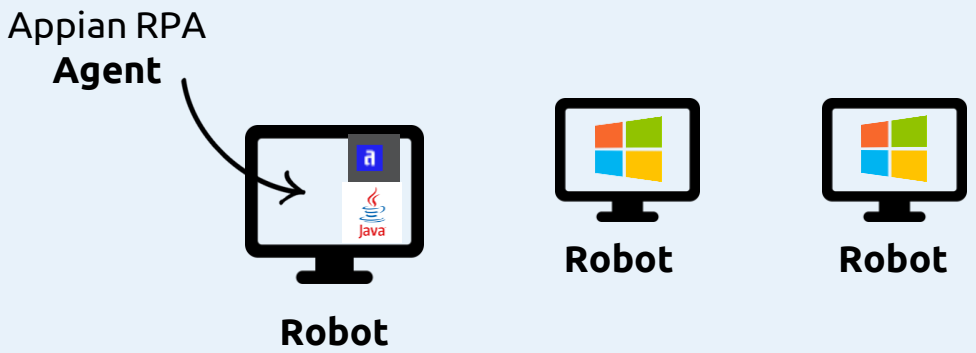
RPA Agent





All agents are automatically pre-signed

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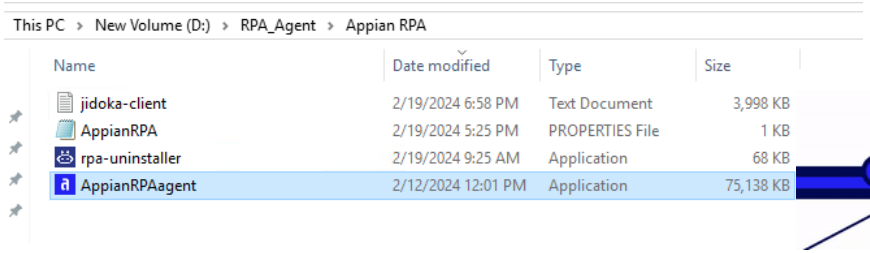
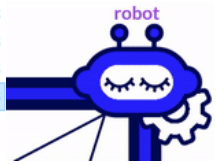
RPA Agent



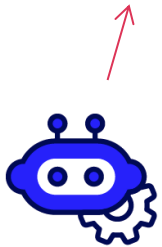


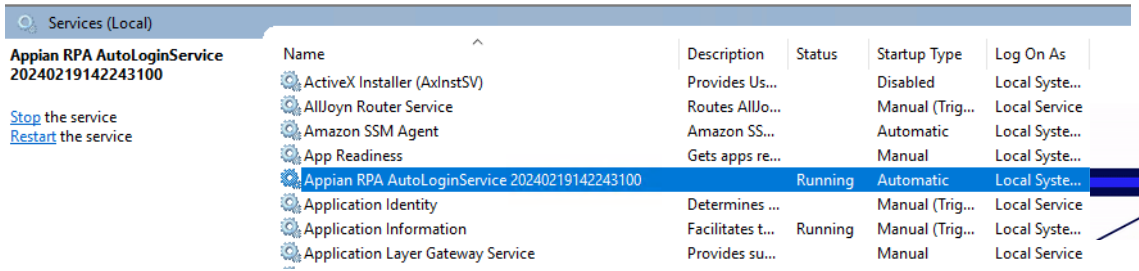
Start the Agent by quickly launching the *AppianRPAagent.exe*

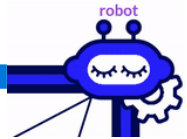
or

Start it as a Windows service.

The RPA autologin service now automatically updates to the latest version when connecting to the newer version of Appian RPA in 9.13.







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Lesson 7

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Robotic Tasks

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What is a Robotic Task?

- A scripted program designed to automate tasks and steps in a business application
- Built to interact with user interfaces
- Perform steps that a human might otherwise need to do
- Consists of Low-code and/or Java code, and a workflow

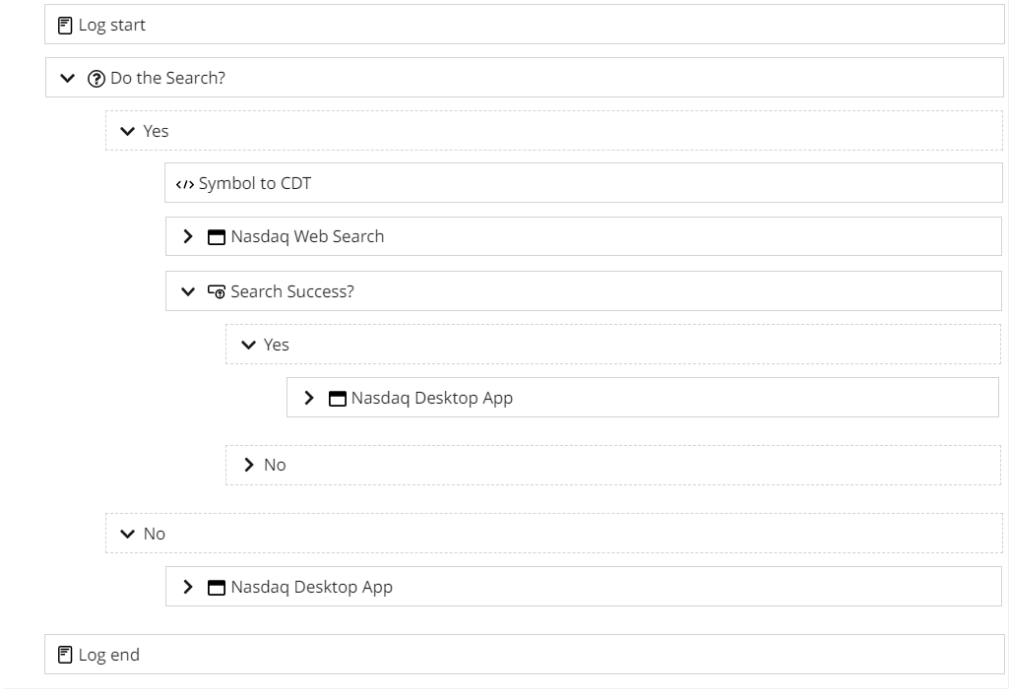
Robotic Task

Notepad Example

This is an action for a loop!

Robotic Task

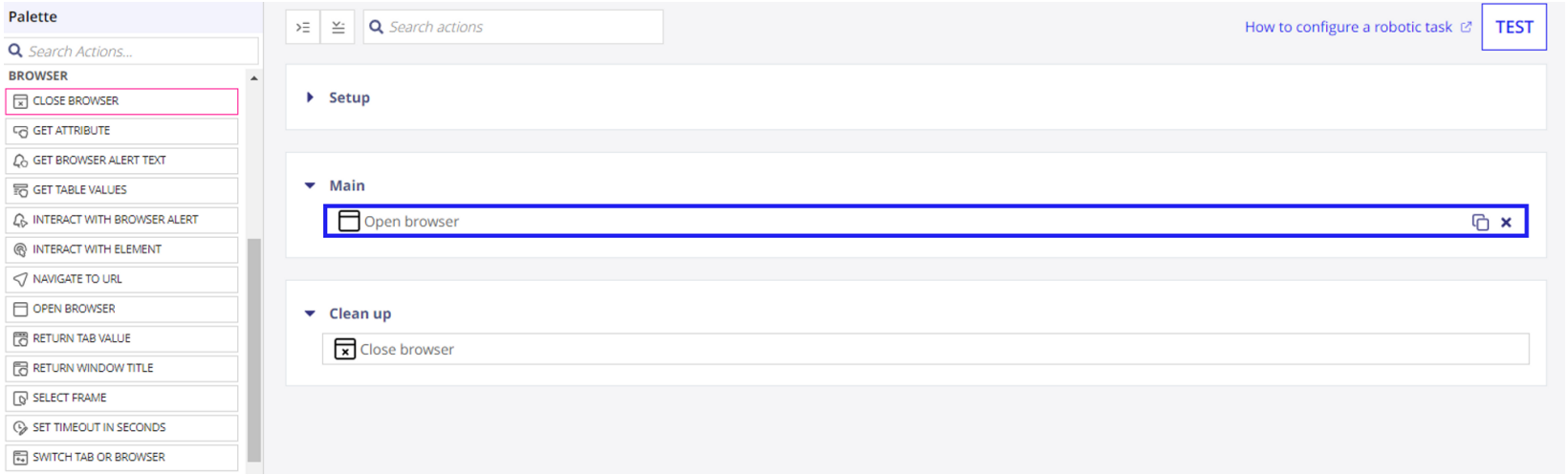
Nasdaq Example

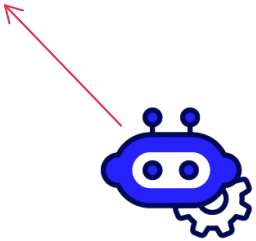


Basic Steps to Create a Robotic Task

- Add a robot pool
- Complete the details for Name and Permissions matching the Robot permissions
- Ensure the version of Chrome matches the ChromeDriver in the Support files.
- Add Robotic task variables
- Use Appian Task Recorder to Generate the Workflow
- Create New Actions to extract results
- Update the Robotic task variables and the Workflow

Designer Example





The palette helps build robotic tasks fast !

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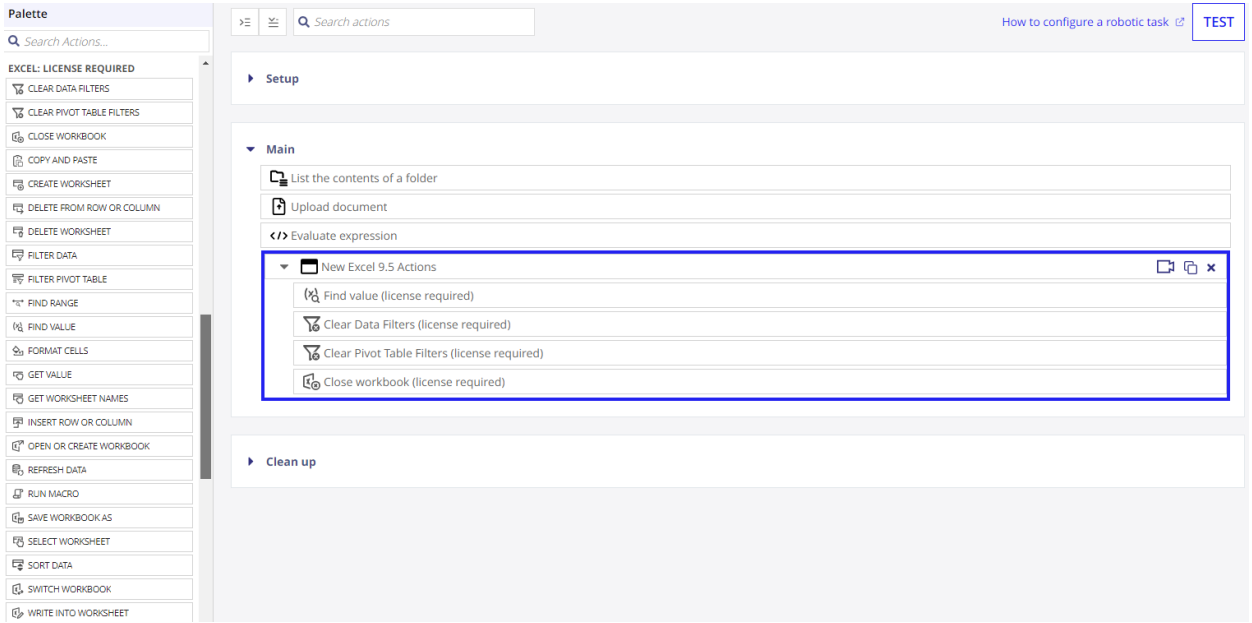
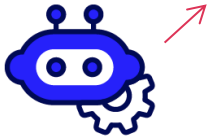
Designer Example

Excel Actions





Excel Actions !

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Designer Example

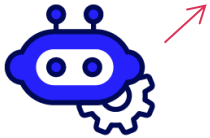
Versioning

Versions

Created By | From | To | Clear Filters

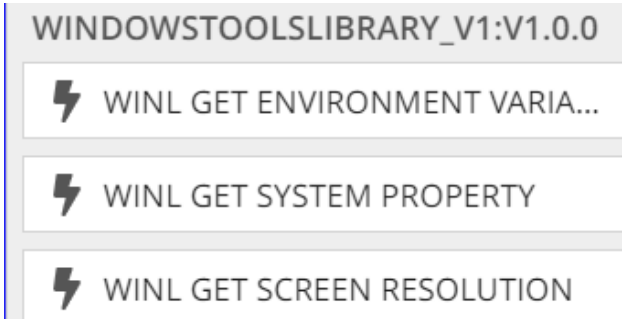
Version	Name	Description	Created	
Latest	RRNRD_NasdaqWebSearch	Robotic task that performs a lookup and captures data ...	7/11/2024 7:14 PM by Randy Richeson	✕
1	RRNRD_NasdaqWebSearch	Robotic task that performs a lookup and captures data ...	7/11/2024 6:59 PM by Randy Richeson	✕

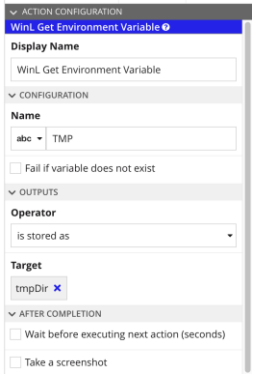
CLOSE

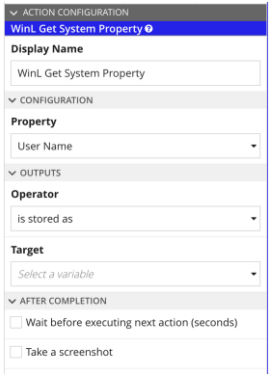


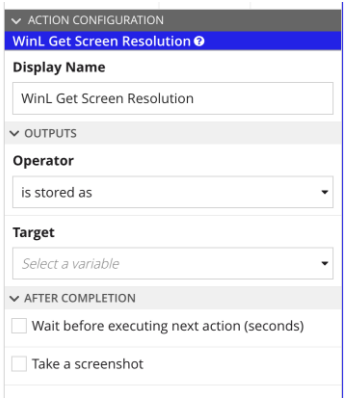
Robotic tasks are versioned!

AppMarket Example









New actions can quickly be deployed from the AppMarket!

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Lesson 8

Building Robotic Tasks with the Appian Task Recorder and Browser Actions

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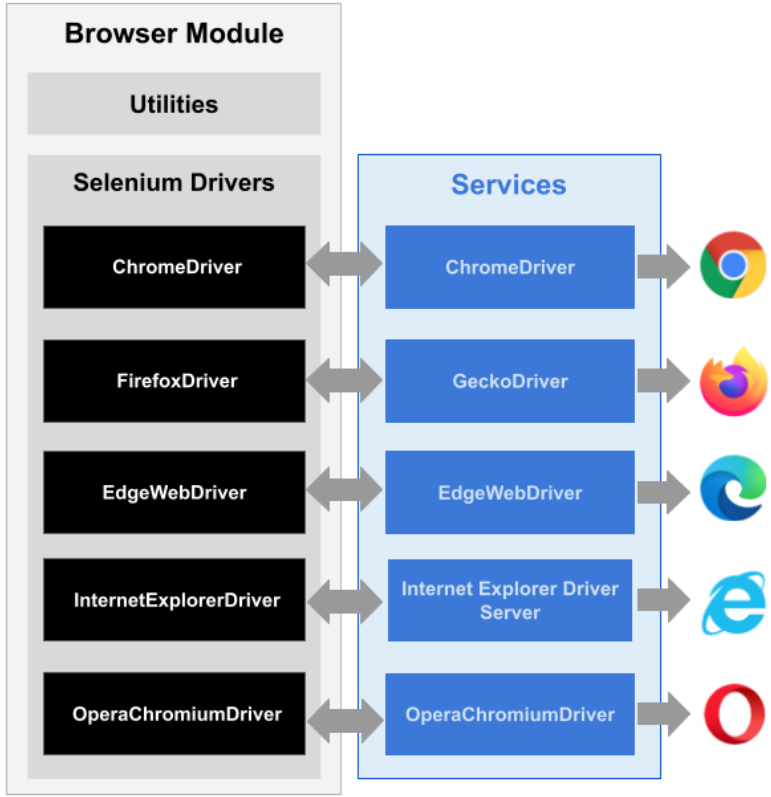
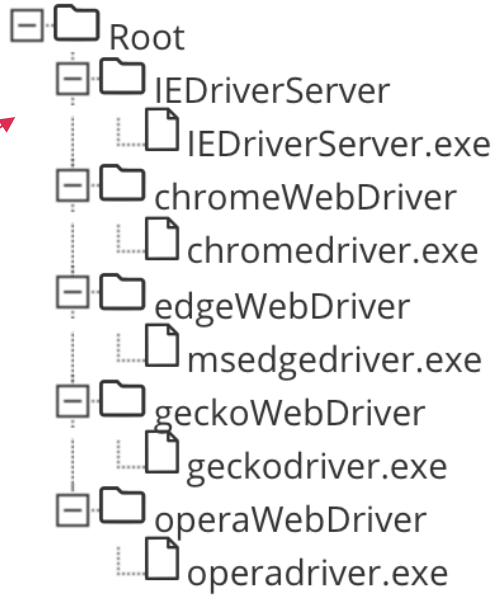
Browser Module Architecture

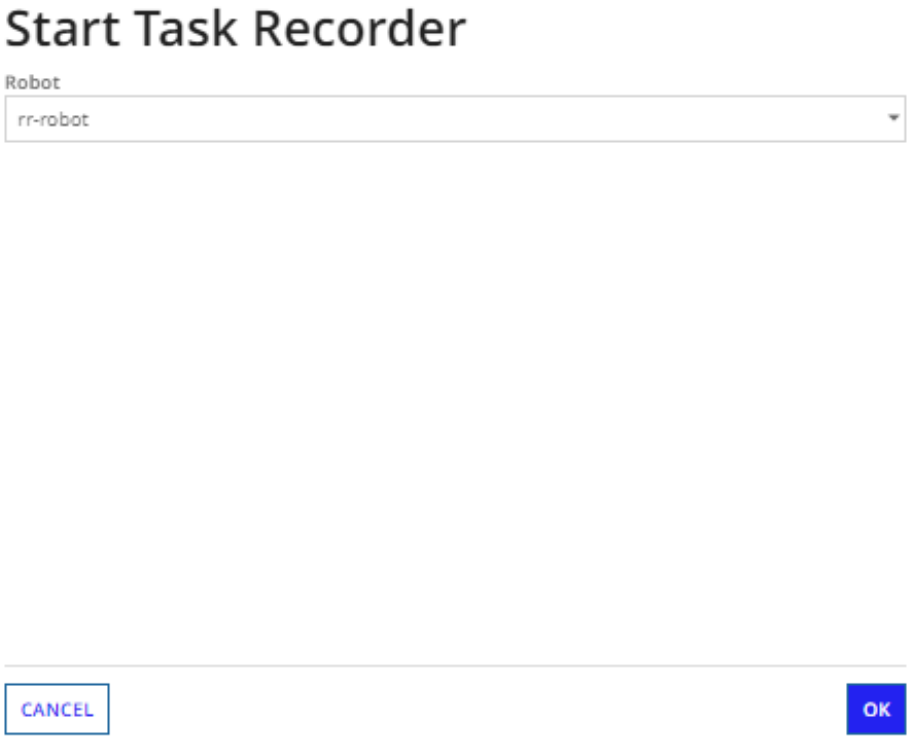


Browser Module Support File Structure

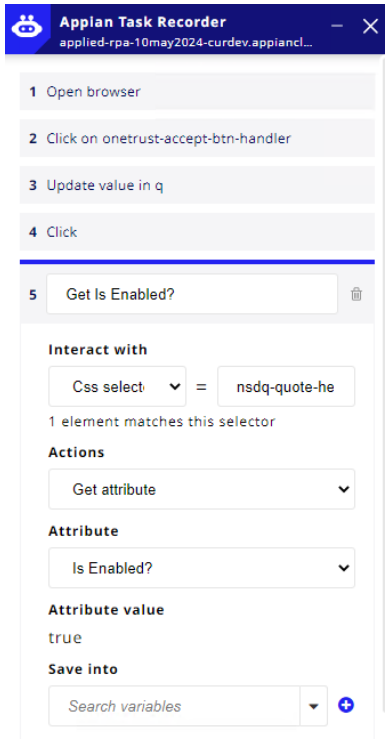
Driver paths for Windows and Mac are case insensitive.



Task Recorder: Start recording

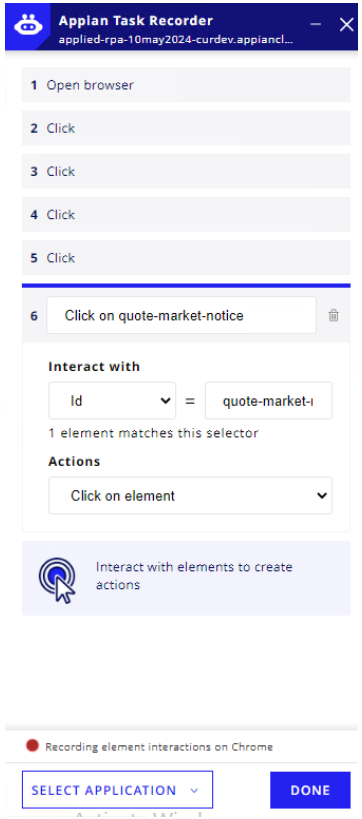


Appian Task Recorder: Add Group



Nasdaq site

Yahoo Finance site

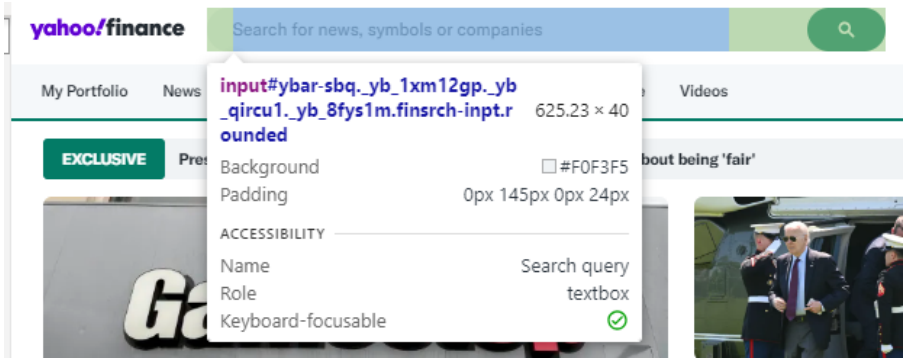


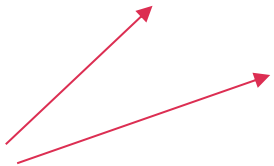
Selenium Components

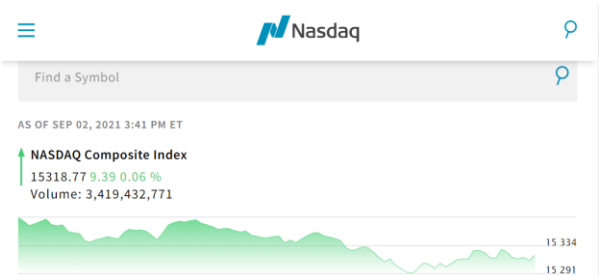
- Selenium WebDriver: Collection of language specific bindings to drive a browser.
- Selenium IDE: A Chrome, Firefox and Edge add-on that will do simple record-and-playback of interactions with the browser.
- Selenium Grid: Run tests against a combination of browsers and operating system.

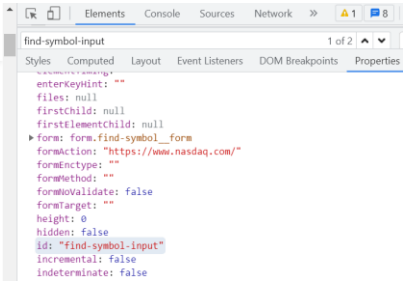
The Selenium IDE and Selenium Grid are not needed by Appian

Inspect find-symbol-input Example









Inspect with your browser

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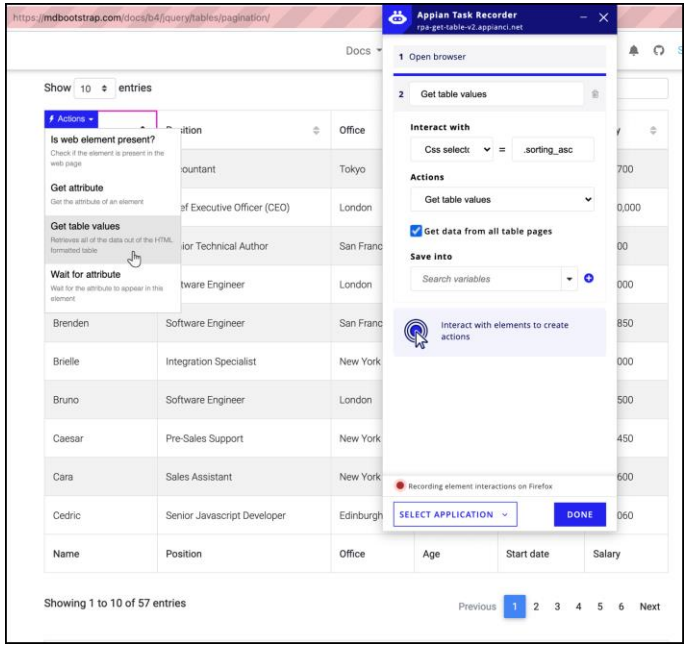
Example
Task Recorder with Get table values



Quickly Extract data from HTML tables with the **Get table values** action !

Lesson 9

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Create New Actions to Extract and Log Results

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New Actions for Nasdaq site

- Nasdaq Section
  - Log start of NASDAQ section
  - Open browser
  - Search Symbol
  - Get Is Enabled?
  - Locate green
    - Is color green?
  - Get Name
  - Debug Name
  - Log end of NASDAQ section

New Actions for Yahoo Finance site

- Main
  - Nasdaq Section
    - Log start of NASDAQ section
    - Open browser
    - Search Symbol
    - Get Company Info
      - Get Name
      - Get Last Price
      - Get Increment
      - Get Percent
      - Get Data as Of
      - Debug
    - Log end of NASDAQ section

Condition Actions

- Main
  - Nasdaq Section
    - Open browser
    - Search Symbol
    - Get Is Enabled?
    - Locate green
    - Is color green?
      - Yes
        - Get Up Price Info
          - Get Last Price
          - Get Pricing Change
          - Get Percent Change
          - Get Data As Of
      - No
        - Get Down Price Info
          - Get Last Price
          - Get Pricing Change
          - Get Percent Change
          - Get Data As Of
    - Get Name

Condition Actions

- Nasdaq Section
  - Log start of NASDAQ section
  - Open browser
  - Search Symbol
  - Is audience survey present?
  - Get Company Info
  - Increase?
    - Yes
      - Set Increase
      - Debug Behaviour
    - No
      - Decrease?
        - Yes
          - Evaluate expression
          - Debug Behaviour
        - No
  - Log end of NASDAQ section

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Grouping Actions

- Get Up Price Info
  - Get Last Price
  - Get Pricing Change
  - Get Percent Change
  - Get Data As Of

Lesson 10

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Exception Handling

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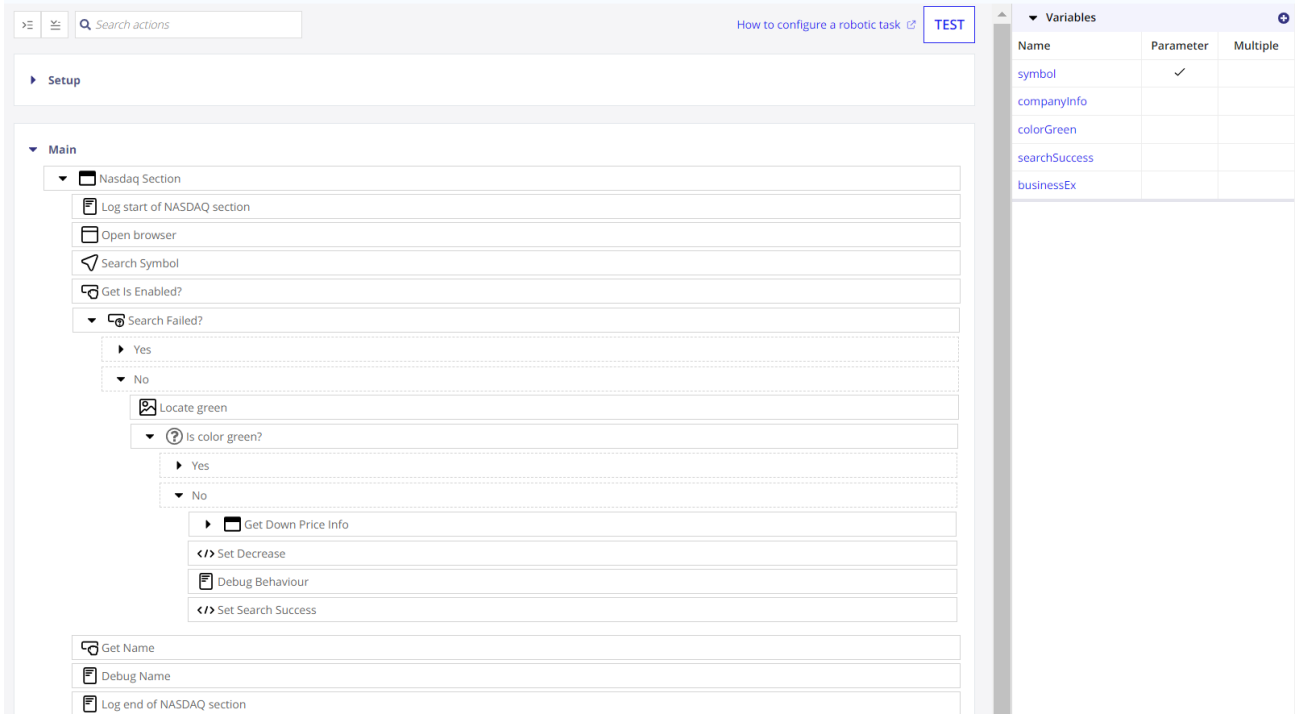
System Exceptions

- Browser does not open
- No internet connection
- Problems connecting to the server
- Error loading components of the page
- Other various browser interruptions
- File not be found

Business Exceptions

- Informed by the client in the use case of a robotic task
- Found in the development of the robotic task, both in the preliminary study and in the tests

Nasdaq Search Workflow Example



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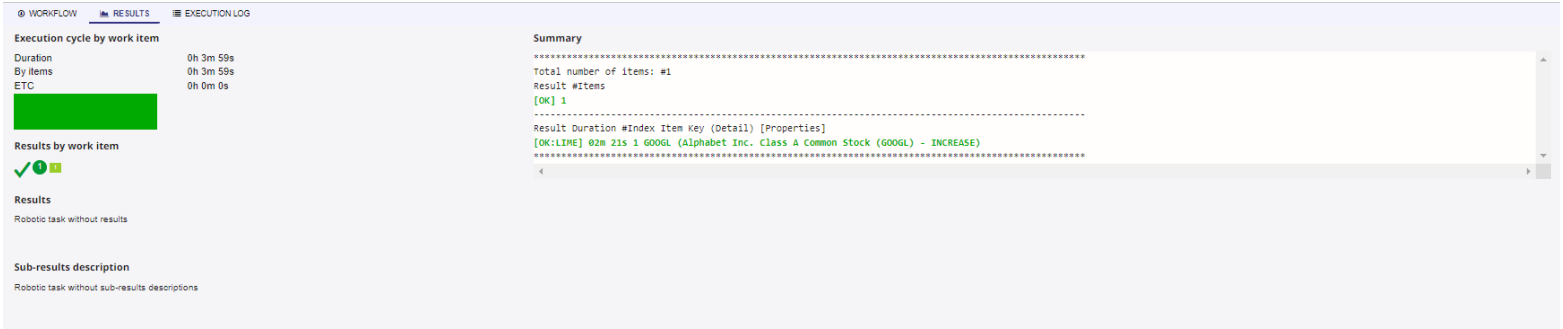
Lesson 11

Items Actions

Items Actions

- Easily handle items in your robotic task
- Associate a workflow action with one of the following actions:
  - Set number of items
  - Set next item
  - Set item result

Items Actions Results Example



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Lesson 12

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Executions, Testing and Debugging

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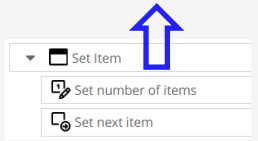
Debug Types

- Additional Information with an Individual Action which depends on the developer
- Low-code actions which cannot be controlled

Execution Log Example

```
[STAT] 2024-01-23 14:17:21 - - <ACTION_START> - Start action 'items->set-number-of-items' - 'Set number of items' // dur: - - avg: - etc:
[STAT] 2024-01-23 14:17:21 - - <NUMBER_OF_ITEMS> - #1 of total items // dur: - - avg: - etc:
[STAT] 2024-01-23 14:17:21 - - <ACTION_END> - End action 'items->set-number-of-items' - 'Set number of items' (transition through '' to 'items->set-next-item') // dur: - - avg: - etc:
[STAT] 2024-01-23 14:17:21 - - <ACTION_START> - Start action 'items->set-next-item' - 'Set next item' // dur: - - avg: - etc:
[STAT] 2024-01-23 14:17:21 - - <ITEM_START> - Start #1 of #1 (id: GOOGL) () // dur: - - avg: - - etc: -
[STAT] 2024-01-23 14:17:21 - - <ACTION_END> - End action 'items->set-next-item' - 'Set next item' (transition through '' to '[no-action]') // dur: - - avg: - etc:
[STAT] 2024-01-23 14:17:21 - - <ACTION_START> - Start action '[no-action]' - 'end' // dur: - - avg: - etc:
[STAT] 2024-01-23 14:17:21 - - <ACTION_END> - End action '[no-action]' - 'end' (transition through '' to 'section-1705949907904') // dur: - - avg: - etc:
[STAT] 2024-01-23 14:17:21 - - <ACTION_START> - Start action '[no-action]' - 'start' // dur: - - avg: - etc:
[STAT] 2024-01-23 14:17:21 - - <ACTION_END> - End action '[no-action]' - 'start' (transition through '' to 'execution->log') // dur: - - avg: - etc:
[STAT] 2024-01-23 14:17:21 - - <ACTION_START> - Start action 'execution->log' - 'Log start of NASDAQ section' // dur: - - avg: - etc:
[INFO] 2024-01-23 14:17:21 - - Start of section NASDAQ Test.
[STAT] 2024-01-23 14:17:21 - - <ACTION_END> - End action 'execution->log' - 'Log start of NASDAQ section' (transition through '' to 'browser->open-browser-v2') // dur: - - avg: - etc:
[STAT] 2024-01-23 14:17:21 - - <ACTION_START> - Start action 'browser->open-browser-v2' - 'Open browser' // dur: - - avg: - etc:
[INFO] 2024-01-23 14:17:21 - - Detected SO: WINDOWS
[DEBUG] 2024-01-23 14:17:21 - - Waiting for condition "Browser initialization", try #1 of #5
[DEBUG] 2024-01-23 14:17:21 - - The web driver file must exist at: D:\RPA_Agent\Appian RPA\.\Jidoka-workspace\65aeaf43b0bcaa5e6ea70336\.\geckoWebDriver\geckodriver.exe
[DEBUG] 2024-01-23 14:17:21 - - Using default module Firefox options
[DEBUG] 2024-01-23 14:17:25 04s (0h) - Browser version: 121.0.1
[DEBUG] 2024-01-23 14:17:25 04s (0h) - Condition "Browser initialization" satisfied with #1 of #5 attempts
[DEBUG] 2024-01-23 14:17:25 04s (0h) - New page load timeout established: 60
[DEBUG] 2024-01-23 14:17:25 04s (0h) - Waiting for condition "Activate browser window", try #1 of #4
[DEBUG] 2024-01-23 14:17:25 04s (0h) - Maximizing browser window
[DEBUG] 2024-01-23 14:17:25 04s (0h) - Condition "Activate browser window" satisfied with #1 of #4 attempts
[DEBUG] 2024-01-23 14:17:25 04s (0h) - Navigating to https://www.nasdaq.com/
[DEBUG] 2024-01-23 14:17:28 07s (0h) - Navigation finished
[STAT] 2024-01-23 14:17:28 07s (0h) - <ACTION_END> - End action 'browser->open-browser-v2' - 'Open browser' (transition through '' to 'common-actions->pause') // dur: 07s - avg: - etc:
```



Internal log of the low-code method

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Execution Options Example

Enable video recording?

Record a video of the robotic process execution in MP4 format

Make a full execution recording?

1 Frame rate

0 Minutes from start

1 Minutes from end

Deferred execution?

Execute from this date and time

12/19/2017

Date

08:30

Time

Lesson 13

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Windows Automation, Keyboard, Image Recognition and Operating System Actions

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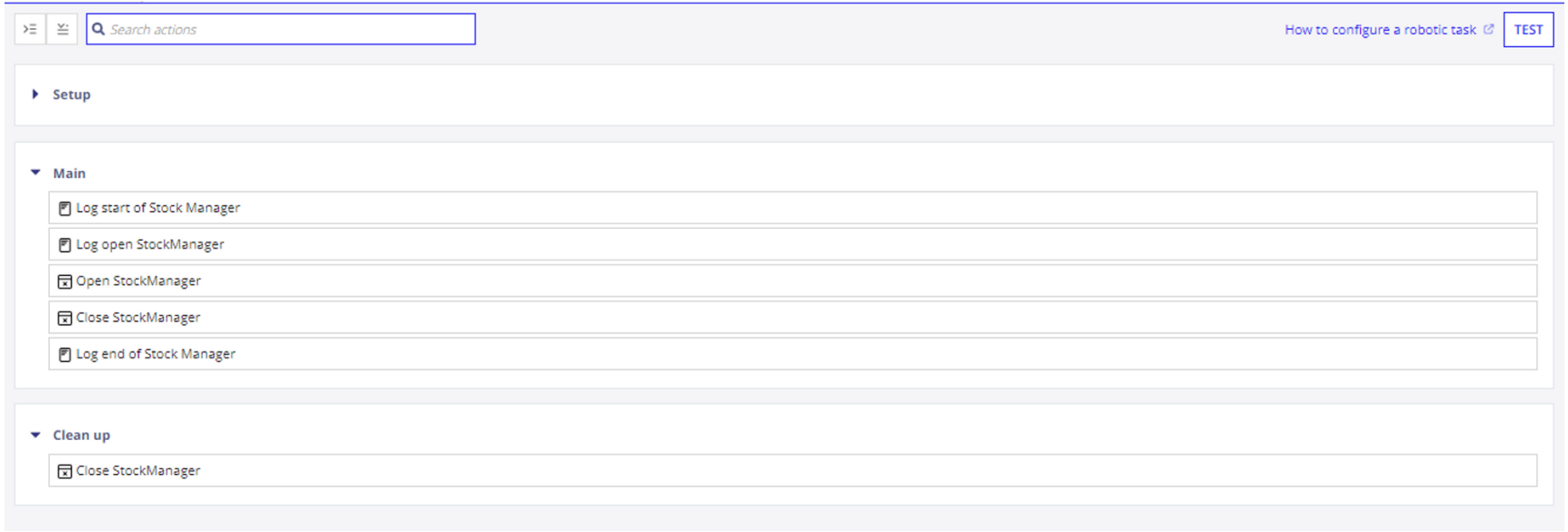
Windows Automation Module Example



Lesson 14

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Execute Robotic Tasks using Process Model RPA Smart Service

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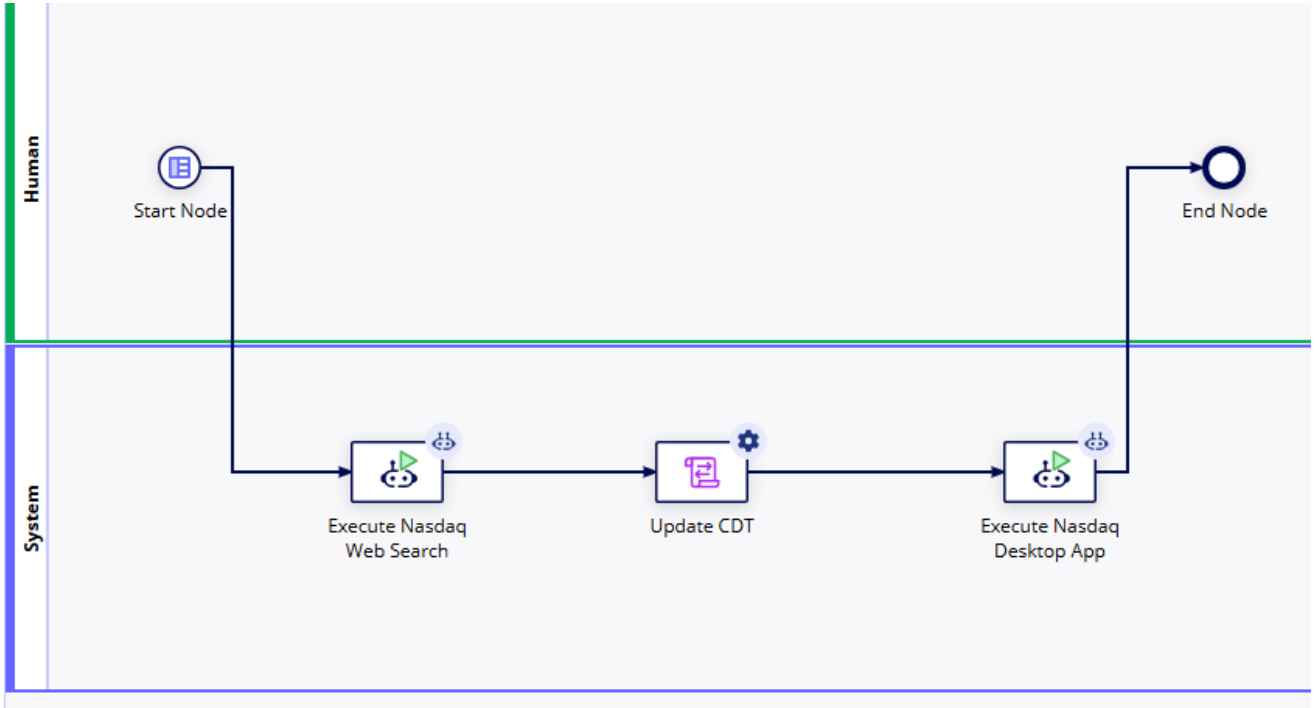
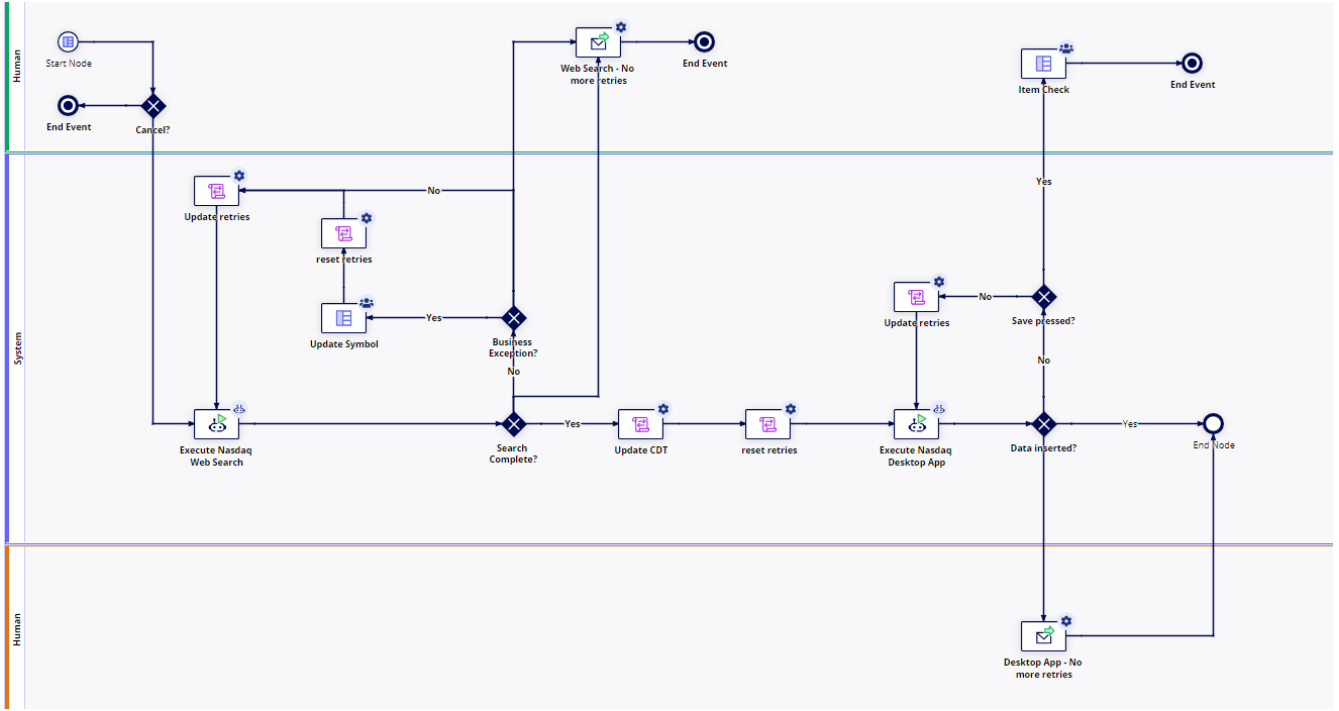
Process Model

Happy Path Example



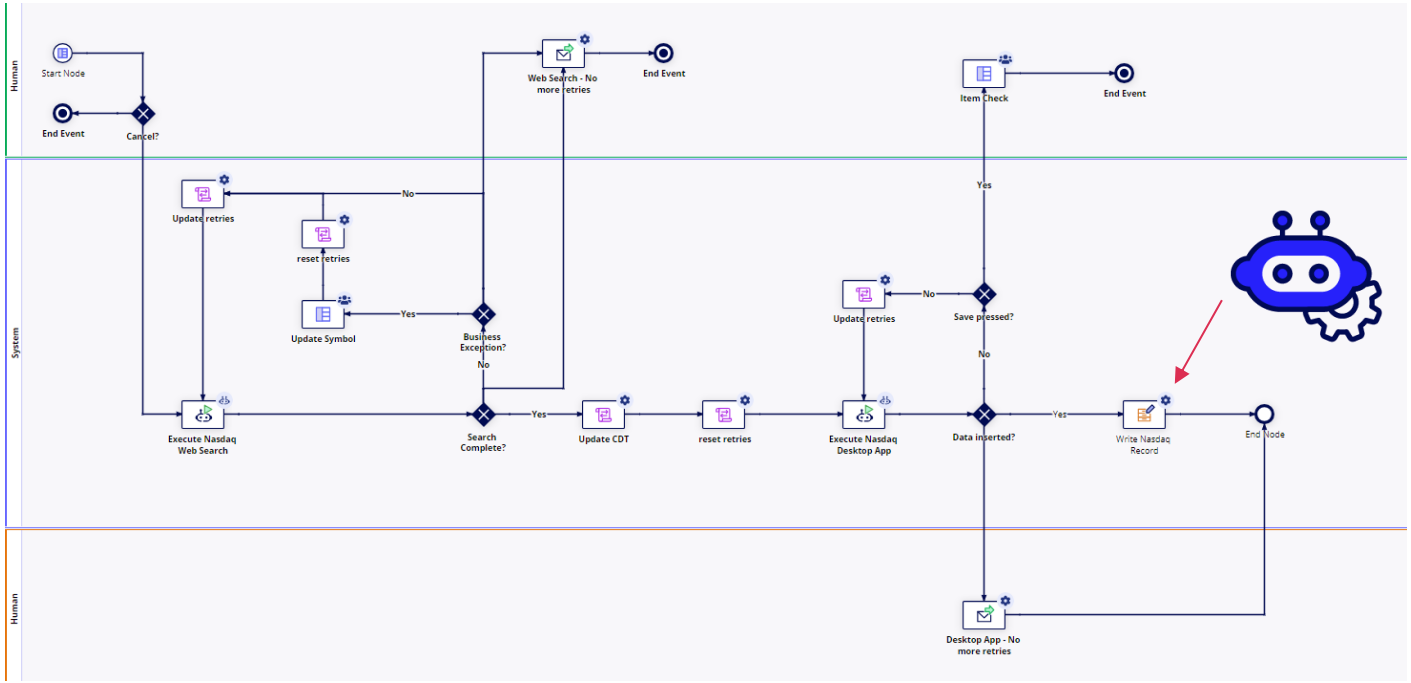
Process Model

Exception Handling Example



Process Model

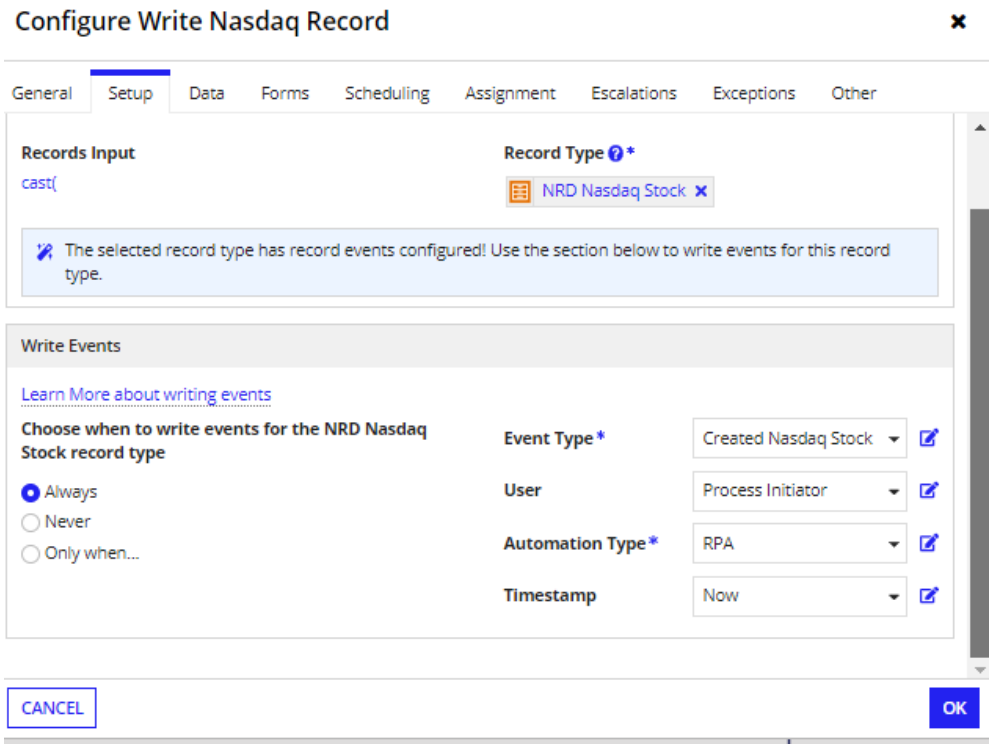
Write Records Example



Data Fabric !!!

Process Model

Write Records Setup Example



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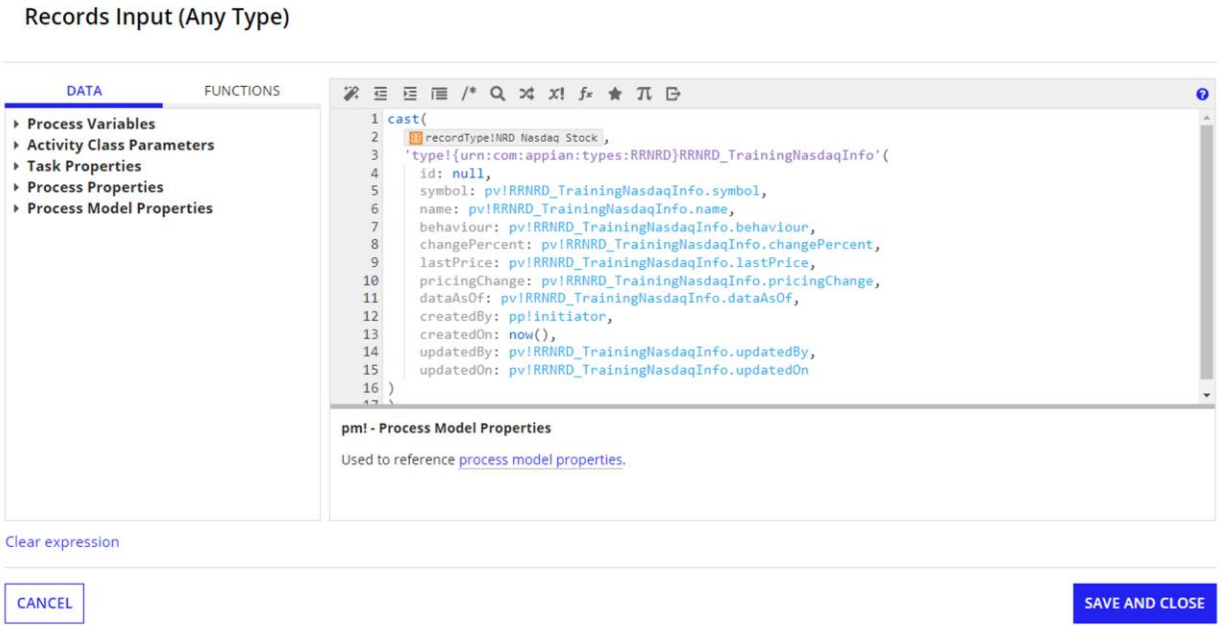
Process Model

Write Records Input Example



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Lesson 15

Excel Actions

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Excel Actions

License Not Required Example

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Lesson 16

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Troubleshooting RPA

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Potential Issues
Diagnose and Troubleshoot

- Host Machine
- Robot
- Selenium Drivers
- Browser
- Robot Pool
- Robotic Task
- Process Model

Helpful Troubleshooting Components

Host

- jidoka-client.log
- appianLoginAgent.log

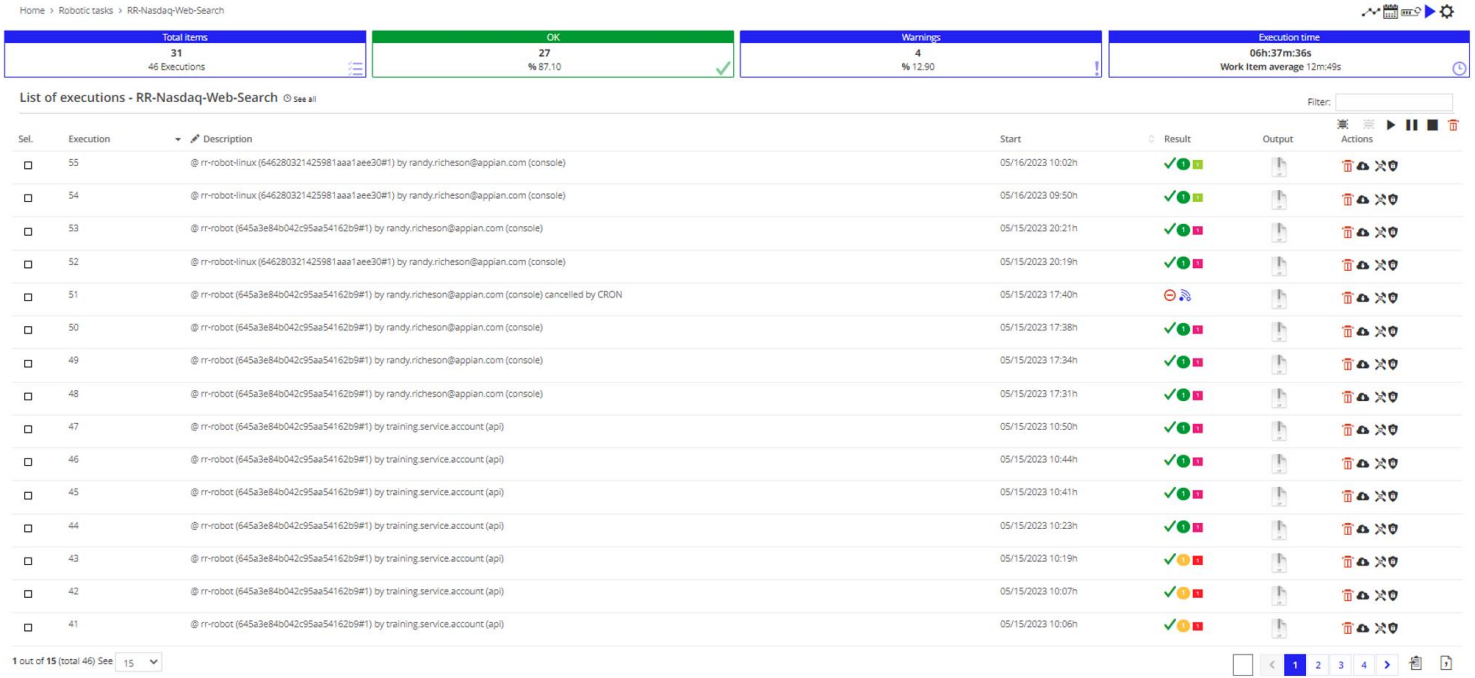
RPA

- Execution log
- Items Actions
- Robotic Task Chart

Process Model

- Process Model Process Instance Details
- Monitor Health Dashboard
- Monitor Process Activity

Robotic Tasks Chart Example



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Conclusion

Bonus Lesson

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RPA with AI Skills

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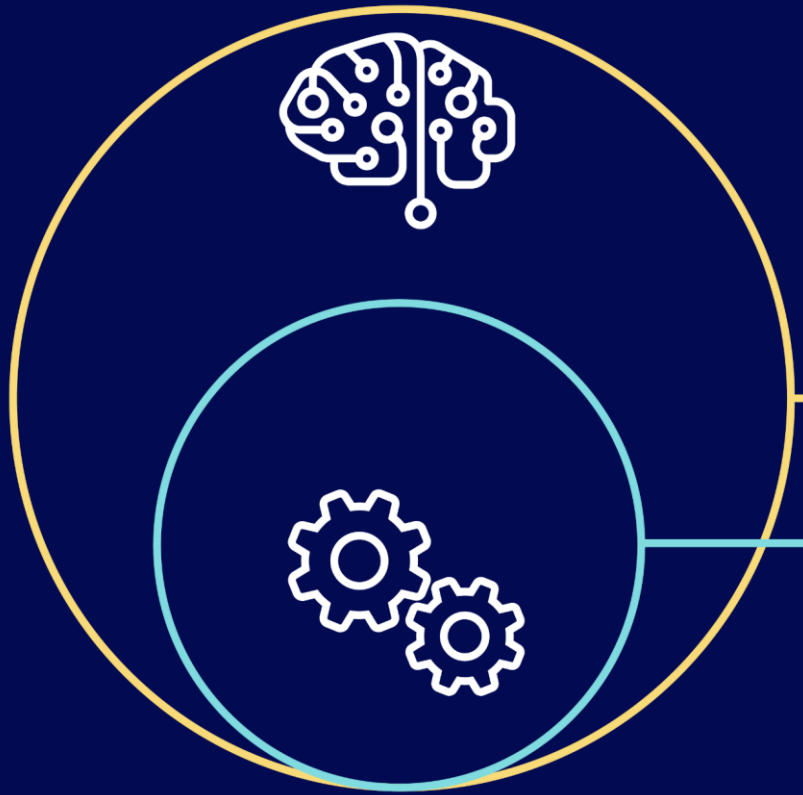

Artificial Intelligence

AI can mimic human intelligence to solve problems and make predictions in uncertain circumstances.

Machine Learning

Machine learning (ML) is how AI autonomously learns over time.

Generative AI creates new content based on a natural language prompt.

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Create & Test Prompt

Models enforce token limits on prompts, including the input text. Larger prompts may limit the amount of input text the model will accept.
There is a maximum of 150,000 characters between the prompt and examples.

Prompt

Describe what you'd like the model to do when it receives the input.

<Role>
You are an expert at summarizing the performance of as stock in 2023 .
</Role>

<Task> You will be given a stock ticker. Summarize this NASDAQ Stock as of 2024. This summary should be more than 150 words and less than 300 words. Use 3-5 paragraphs. Use information from 3 sources. You need to answer the following questions using the input example and provide the source of your information.
</Task>

<Questions>
Is this stock a good investment?
What is the probability that this stock will increase in the next year?
What is the probability that this stock will double in the next five years?
What is the probability this company could be acquired in the next five years?
Is there any pending legal actions that could lower the value of this stock?
</Questions>

Temperature

Tell the model how similar or varied you'd like the responses to be

25

0 25 50 75 100

Less Random
Output will be more predictable and consistent

Highly Random
Output will be more diverse and creative

Provide Examples

The model can deliver more precise results when you provide example inputs and outputs. The inputs and outputs are specific to your use case.

Test Prompt

Test Input

GOOGL

TEST

Output

Review AI-generated content to make sure it is accurate and appropriate.
Learn more about Generative AI

Here is a summary of Google (NASDAQ: GOOGL) stock as of 2024:

Google remains a strong investment as one of the largest technology companies in the world. In 2023, the stock increased over 15% as the company continues to dominate internet search and online advertising (Investopedia, 2024).

Google has several promising growth areas that are likely to boost revenues and earnings in coming years. Its cloud computing division Google Cloud is growing rapidly and competing strongly against Amazon Web Services and Microsoft Azure. Google's hardware products such as Pixel phones and Nest smart home devices are also gaining popularity (The Motley Fool, 2024).

The company's autonomous vehicle subsidiary Waymo is seen as a leader in self-driving car technology. If Waymo is successful in deploying autonomous taxis and trucks, it could become a huge new business for Google. There is also potential for Google to expand into healthcare and other industries with its artificial intelligence expertise (CNN Business, 2024).

Given its strong market position, innovative culture and massive cash flows, there is a high probability that Google stock will continue to appreciate over the next year. Financial analysts estimate the stock has a 60-70% chance of gains. However, sustained 20% annual returns may be unlikely given Google's large size. Over five years, there is a solid 40-50% probability the stock could double in value based on continued growth of Google's core businesses and new opportunities.

Bonus Lesson

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Service Accounts and API Keys

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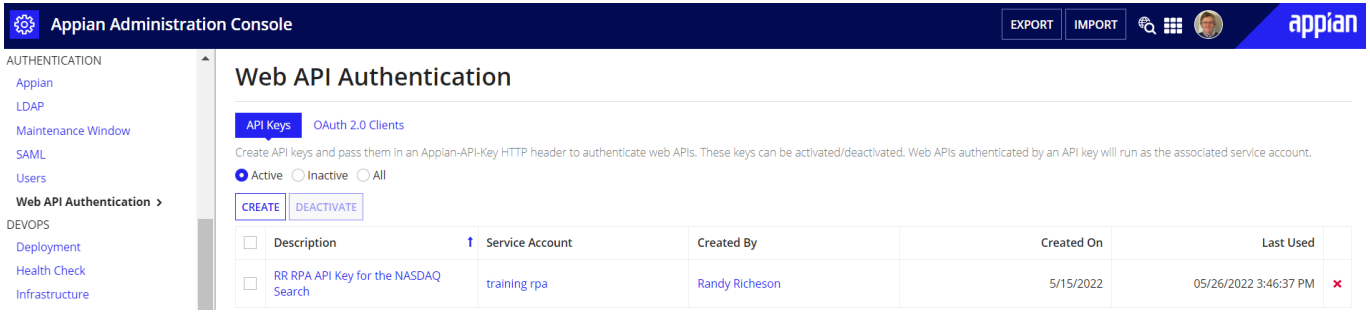
Web API Authentication

The API Keys tab helps you to create and manage API keys and Service Accounts, which can be used to invoke Appian Web APIs. This page allows you to:

- Create a new API key and/or service account
- Deactivate and reactivate API keys
- Permanently delete API keys



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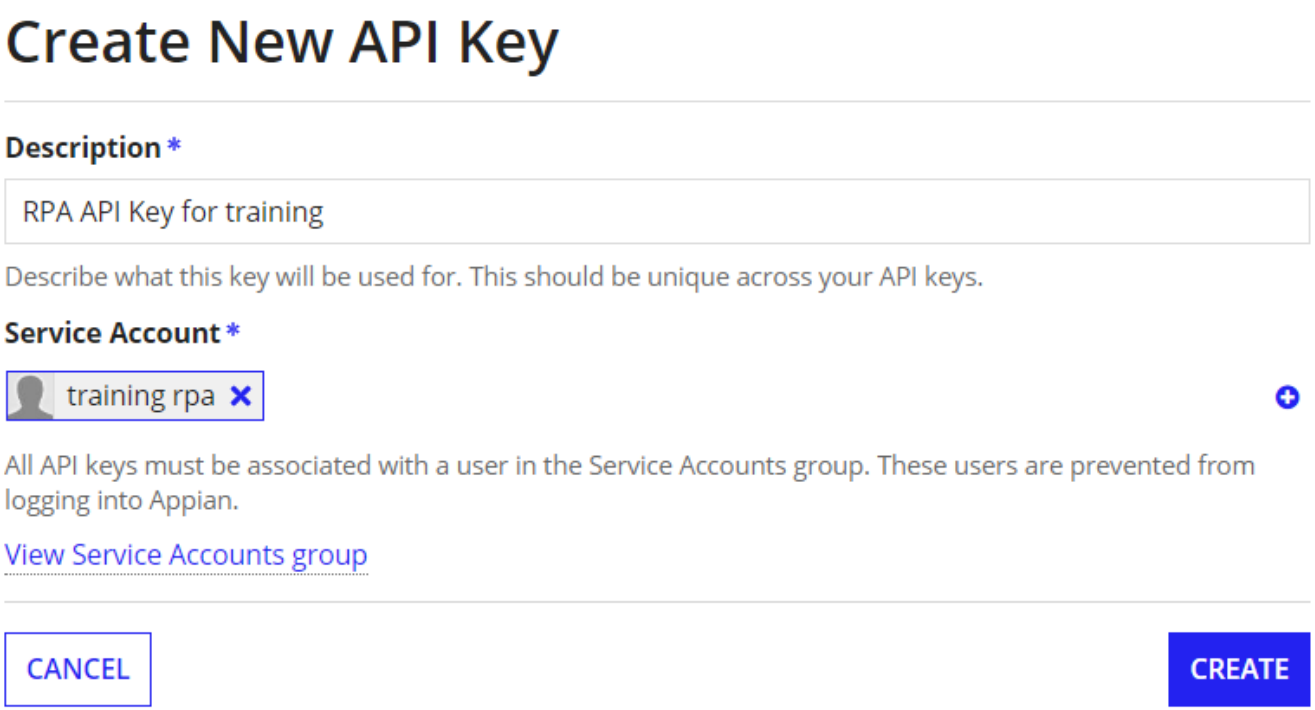
Create New API Key Example



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Bonus Lesson

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Connected System and Integration for Appian RPA

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Connecting Appian to Appian RPA

You can connect Appian to Appian RPA using:

- Appian RPA Connected System
- Integration


Thank you.