EXPONENTIA DATALABS

<Employee Confirmation Email - EDL>

Readme

Version 1.0

10/10/2019

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1.   Introduction

This document contains all essential information for the user to make full use of the Bot. This manual includes a description of the functions and capabilities and step-by-step procedures for setup & configuration of the Bot.

1.1   Overview

This BOT helps in sending out confirmation email to employees on successful completion of their probation period. The input is provided in an excel sheet and a configuration file. The output is email sent to employee in desired format.

1.2   Common Use cases

This BOT can be used in any organization by Human Resources department to automatically send confirmation email to employees on successful completion of probation period.

2.   Requirements & Prerequisites

2.1   System Requirements

Hardware requirement is same as that of Automation Anywhere Enterprise server and client machine.

2.2   Prerequisites

Automation Anywhere Enterprise v11.1.2
Microsoft Access Database Engine 2016 Redistributable 32 bit

2.3   License Management

None.

2.4   Code Protection

None.

2.5   Security Measures

No specific security requirements.

2.6   Disclaimers

None.

3.   Getting Started

3.1   Skill Matrix

Master Task	Employee Confirmation Email - EDL.atmx
Child Task	00 - Initial HouseKeeping task.atmx

3.2   Installation Hierarchy

- Download the bot from Bot Store.
- Double click on <Bot Name>.msi and follow the installation instructions.
- For first time users, the "Bot Store" folder is created under <AA Directory>/My Tasks (on your local disk).

Create the following folder structure of the content in the AA Dir:

```
<AA directory>\My Tasks\Bot Store\
        \Employee Confirmation Email - EDL
                Error Folder
                        Logs
                                YYYY-MM-DD.txt
                        Snapshots
                                Error Snap DD-MM-YYYY HHMMSS.png
                Input Files
                        ConfigFile.txt
                        ConfirmationSheet.xlsx

                My Tasks
                        Employee Confirmation Email - EDL.atmx
                        00 - Initial HouseKeeping task.atmx
                Output Files
                        Audit Logs
                                AuditLog-YYYY-MM-DD.txt
```

3.3   Quick Start

3.3.1   Setup

Step 1 – install the BOT

Step 2 – install the MS Access DB driver – 32 bit. Link to download page.

Step 3 – Ensure 2 folders, "My Tasks" and "Input Files" are created under AA directory.

Step 4 – "Input Files" folder must have 2 files with the name, "ConfigFile.txt" and "ConfirmationSheet.xlsx".

Step 5 – Update both Config File and Confirmation Sheet with appropriate data. Do not change the format of file and column header. Follow instruction given in following section 3.3.2

Step 6 – Outgoing Email should be set up in AAE client – Tools – options - Email Settings.

Step 7 – Modify Confirmation Email message body in the Master Bot, line number 34.

Step 8 – Execute the bot.

Step 9 – review the Audit file and Error file for details of BOT execution and any error.

3.3.2   Configuration

o **Date format** of both Bot runner machine's system date and AAE client should be DD/MM/YYYY.

o **Configuration File** (configfile.txt) – Config file has key, value combination. The sequence of keys (rows) should not be altered in the file.

Key values	Type	Mandatory	Purpose	Example Input
NotificationEmailIds	Text (email ids)	Yes	Status Email will be sent to these email ids in case of both successful run or failed run.	Comma separated email ids - abc@exponentiadata.com, xyx@exponentiadata.com
CCEmailIds	Text (email ids)	Yes	confirmation email CC list.	Comma separated email ids - abc@exponentiadata.com, xyx@exponentiadata.com
EmailSubject	Text	Yes	Subject line of confirmation email	Confirmation - Exponentia DataLabs

o **Confirmation Sheet** (confirmationsheet.xlsx) – list of employees which are due for confirmation or pending confirmation. Confirmation email will be sent based on 'ConfirmationDate' and 'ConfirmOrNot' column values.

Key values	Type	Mandatory	Purpose	Example Input
EmployeeName	Text	Yes	Name of employee, will be used in confirmation email body.	Ram Prasad Sharma
EmailID	Text (email id)	Yes	Email id of employee, confirmation email will be sent to this email id.	abc@exponentiadata.com
JoiningDate	Date (DD/MM/YYYY)	Yes	Date of joining of employee	15-07-2019
ConfirmationDate	Date (DD/MM/YYYY)	Yes	If employee is due for confirmation on the current date (execution day), email will be sent.	This can be formula driven (90 days + Joining Date) or any other date after DOJ. 15-10-2019
ConfirmOrNot	Text	Yes	IF the value is 'Yes', email will be sent to	Yes

			respective employee.	No
				Pending

4.   Reports

No reports

5.   Logs

Folder Name	File Name	Description
Error Folder/Logs	YYYY-MM-DD.txt	Details (error line number and error description) are logged here.
Error Folder/Snapshots	Error Snap DD-MM-YYYY HHMMSS.png	Error screen shot captured
Output Files/Audit Logs	AuditLog-YYYY-MM-DD.txt	Bot execution logs to show the progress of the BOT and also error conditions (like missing input files) are logged here.

6.   Troubleshooting & Support

6.1   Support

Looks for details in Audit log and Error log folder in case of bot failure.

6.2   FAQs

1. Following could be reason for Bot failure –
   a. Missing config file
   b. Missing input file (confirmationsheet.xlsx)
   c. Error message - "Provider cannot be found. It may not be properly installed." This could be due to missing database driver. Refer section 3.3.1 step 2 for installation.
   d. No email sent even if the criteria is met. This could be due to date format mismatch. Check Audit log file for Joining date, confirmation date and current date values corresponding to employees given in ConfirmationSheet input file.

Appendix A: Record of Changes

No.	Version Number	Date of Change	Author	Notes
1	1.0	10-10-2019	Gaurav Dhing	Initial version

Appendix B: Acronyms

Instructions: Provide a list of acronyms and relative description used within the document. Sequence should be alphabetical

No.	Acronym	Description
1.	DOJ	Date of Joining

Appendix C: References

No.	Topic	Reference Link
1	None	None