State Medical License Search Bot

Automation Anywhere Readme

For States: CA, NY, TX, VA, and GA

Version 1.0

16/12/2019

Table of Contents

1. Introduction

This document contains all essential information for the user to make full use of the State Medical License Search Bot or Digital Worker. Included are descriptions of the functions, capabilities, and step-by-step procedures for setup and configuration of the Bot.
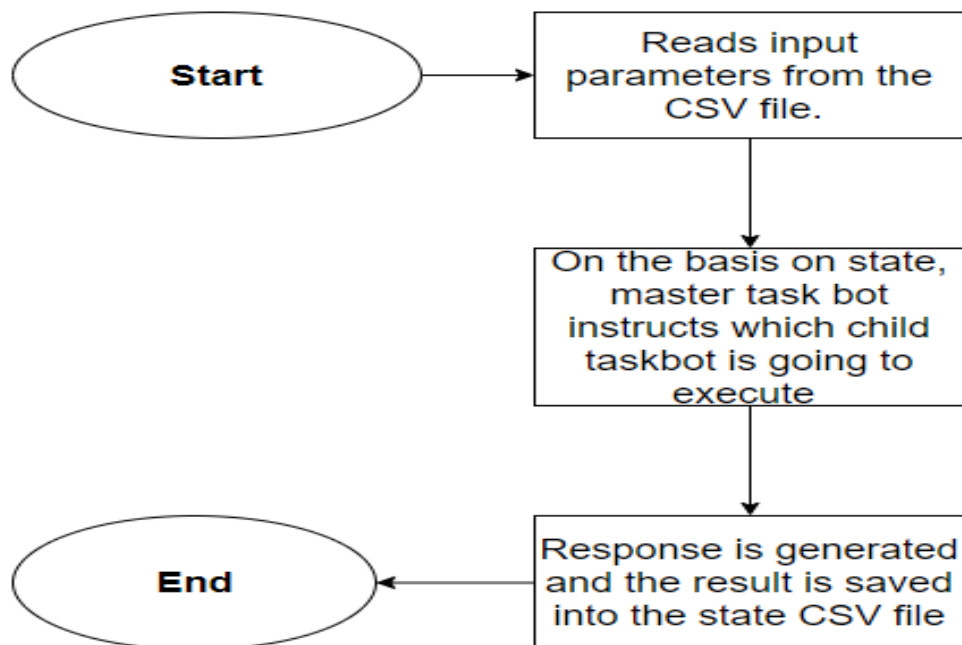
Overview

This Bot takes the license number, issuing state, and physician's first and last names from an input CSV file, fetches information about the physician from the respective state medical board, and saves the result to an output CSV file that is unique to each state.

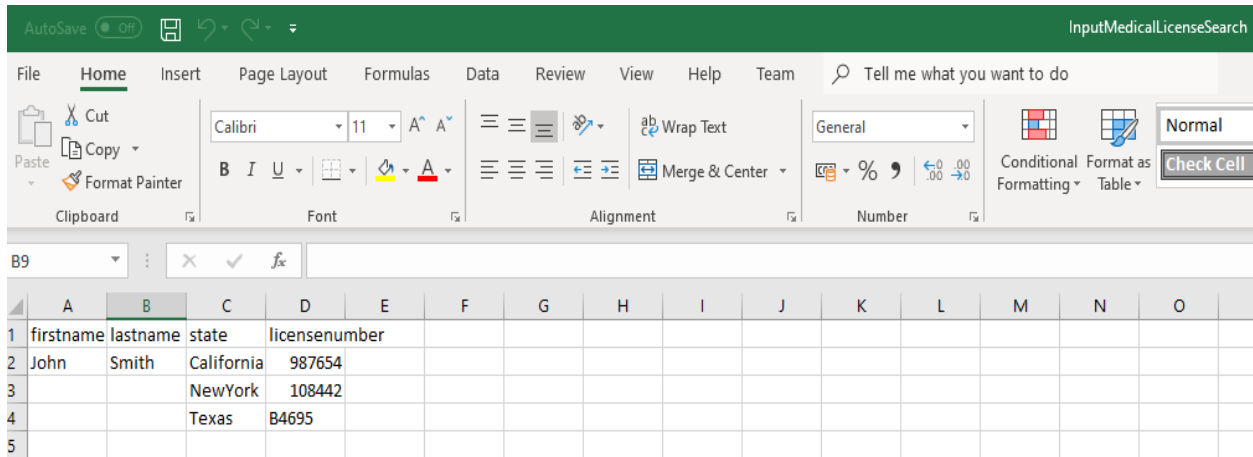**Detailed steps are as follows:**

MedicalLicenseSearch

1) User provides the first name, last name, issuing state (from the list of states covered by this bot), and license number of the physician in the input CSV file, which contains both required and optional parameters.

   - Required Parameters in the input CSV file.

   - Optional Parameters in the input CSV file.

2) A master task bot runs a state-specific task bot and the result is saved to the state-specific CSV file.
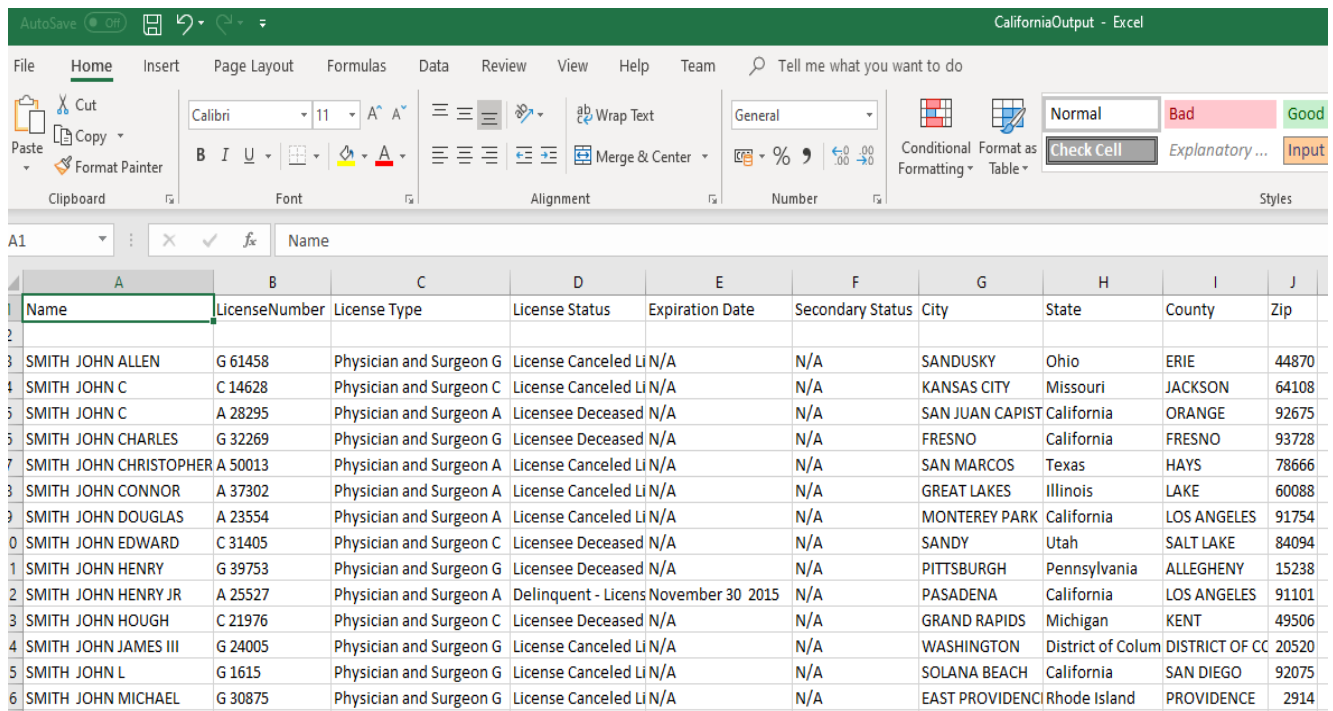
1) <u>**Visual Flow –**</u>

2) **Input and Output Example –**
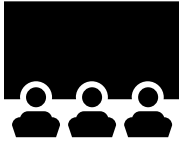
Input: InputMedicalLicenseSearch.CSV

Output: CaliforniaOutput.CSV

Common Use cases

The fields in the CSV can be changed to whatever data needs to be searched.

- ➢ Verify State Medical Licenses for following states:
    - ▪ **California**
    - ▪ **New York**
    - ▪ **Texas**
    - ▪ **Virginia**
    - ▪ **Georgia**

2.   Requirements & Prerequisites

System Requirements

For the PC or server where the bot needs to run:

- ✓ RAM: 8GB or higher
- ✓ Processor: Intel Core i5 or higher and equivalent for any other OS
- ✓ Hard Disk: Up to 2GB of overall free space in the AA Client installation drive

Reference below for Enterprise Client & Control Room system requirements.

Prerequisites

- ✓ **_Software needed -_**
- ✓ AA Enterprise Client 11.x
- ✓ AA Enterprise Control Room 11.x

Security Measures

There are some security best-practice recommendations that you should follow with your bot.

3) Do not provide admin access to the Windows User Account executing the Bots, to avoid unintended data changes within the CSV Template.

3. Getting Started

Skill Matrix
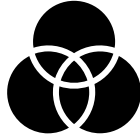
The functionality of the Bot has been divided into a set of skills.

Below is an overview of how the task bots map to these skills:

Skill	Task Files	MetaBot Files
Search and Verify Medical Licensure details of physicians	Medical License Search.atmx California License Search.atmx Georgia License Search.atmx Texas License Search.atmx Virginia License Search.atmx New York License Search.atmx	NewYorkLicense.mbot

Installation Hierarchy

Once the bot is downloaded and installed, the installer creates the files in the folder structure as shown below.

Folder Structure on your Machine

Folder Structure	Description

<AA Application Path>
 	
1. My Tasks
 	
1.1. Bot Store
 	
    1.1.1. State Medical License Search-Automation Anywhere
    ➢ **Error Folder**
      • **Logs**
        o Error logs Month-Day-Year Hour Min Sec.txt
 	
      • **Snapshots**
        o Error Snap Month-Day-Year.png
 	
    ➢ **Input Folder**
      • InputMedicalLicenseSearch.CSV
 	
    ➢ **Output Folder**
      • CaliforniaOutput.CSV
      • GeorgiaOutput.CSV
      • NewYorkOutput.CSV
      • TexasOutput.CSV
      • VirginiaOutput.CSV
    ➢ **My Tasks**
      • Medical License Search.atmx
      • California License Search.atmx
      • New York License Search.atmx
      • Texas License Search.atmx
      • Virginia License Search.atmx
      • Georgia License Search.atmx
	<AA Application Path> is the location where AA files are stored on your machine
	
	1. My Tasks
	My Task Folder is the default directory where bot files are saved.
	
	1.1 Bot Store
	Bot Store Folder contains the Bot Name Folder which the installer creates during installation of the bot.
	    1.1.1. State Medical License Search-Automation Anywhere
	This folder is created by the installer and contains files and folders needed for bot execution:
	➢ **Error folder** is where logs and snapshots of screens will be placed if something goes wrong during execution
	
	➢ **Input Folder** is where the input files that the bot needs for execution of the use case are saved
	    • **InputMedicalLicenseSearch.CSV** provides first name, last name, license number and state of physicians
	
	➢ **Output Folder** is where the output files that the bot needs for execution of the use case are saved
	    • **CaliforniaOutput.CSV** provides details of physicians licensed in California
	    • **NewYorkOutput.CSV** provides details of physicians licensed in New York
	    • **TexasOutput.CSV** provides details of physicians licensed in Texas
	    • **VirginiaOutput.CSV** provides details of physicians licensed in Virginia
	    • **GeorgiaOutput.CSV** provides details of physicians licensed in Georgia

2. **My MetaBots**	
➢ NewYorkLicense.mbot	➢**My Tasks** folder contains all the Developed Platform Source Code ➢ **My MetaBots** folder contains the Developed Metabots needed for bot execution.

Quick Start

3.1.1 Setup

STEP 1 (Configuring Parameters with an External File)

External file can be configured at -

AA Application Path > My Tasks > Bot Store > State Medical License Search-Automation Anywhere> Input Folder>InputMedicalLicenseSearch.CSV

AA Application Path > My Tasks > Bot Store > State Medical License Search-Automation Anywhere > Output Folder > CaliforniaOutput.CSV

AA Application Path > My Tasks > Bot Store > State Medical License Search-Automation Anywhere > Output Folder > NewYorkOutput.CSV

AA Application Path > My Tasks > Bot Store > State Medical License Search-Automation Anywhere > Output Folder > TexasOutput.CSV

AA Application Path > My Tasks > Bot Store State Medical License Search-Automation Anywhere > Output Folder > VirginiaOutput.CSV

AA Application Path > My Tasks > Bot Store > State Medical License Search-Automation Anywhere > Output Folder > GeorgiaOutput.CSV

Below is a table that summaries what each variable name is, what it does, and an example of the input:

Medical License Search

Variable Name	Type	Mandatory (Yes/No)	Purpose	Example Input
vFirstName	Text	No	First name of physician, taken from input CSV file	John
vLastName	Text	No	Last name of physician, taken from input CSV file	Smith
vState	Text	Yes	State issuing physician's license, taken from input CSV file Accepted values: **California** **New York** **Texas** **Virginia** **Georgia**	Texas
vLicenseNumber	Text	No **(Required in case of New York)**	License number of physician, taken from input CSV file	B11111

Note: Both license number and (first name and last name) are used to identify the physician. So in one row of the input CSV file, either or both must be present.
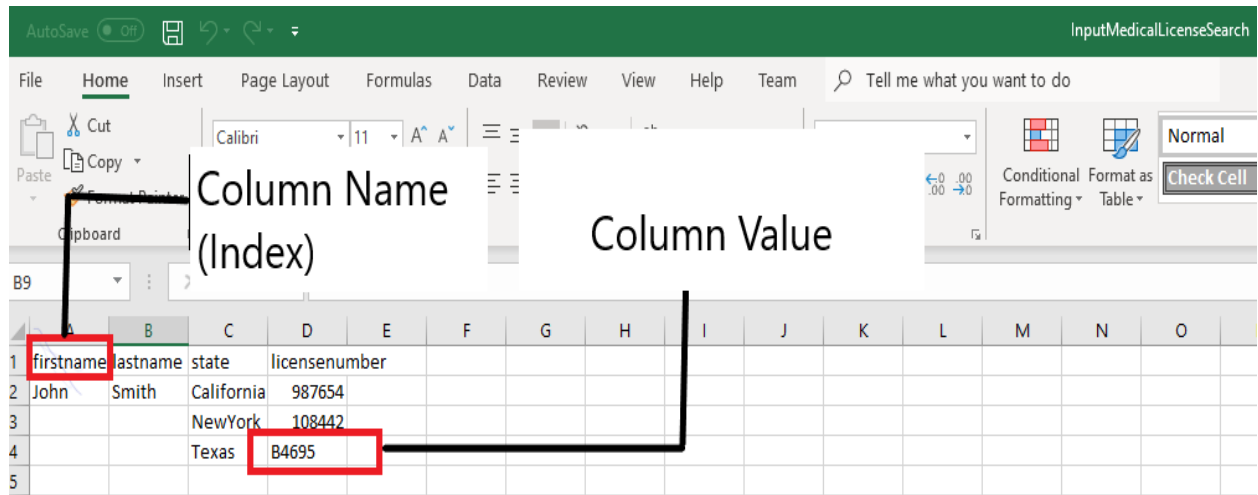
3.1.2 Guidance for configuring Filter conditions

a. Filter based on Column Value

Column Name is the header text that is present in the first row of the CSV file. Please do not delete or alter the Column Name.

Column Value is the value which needs to be matched against the Column Name. You can add or delete parameters as per your requirements.

Example

➢ **Input CSV File-**
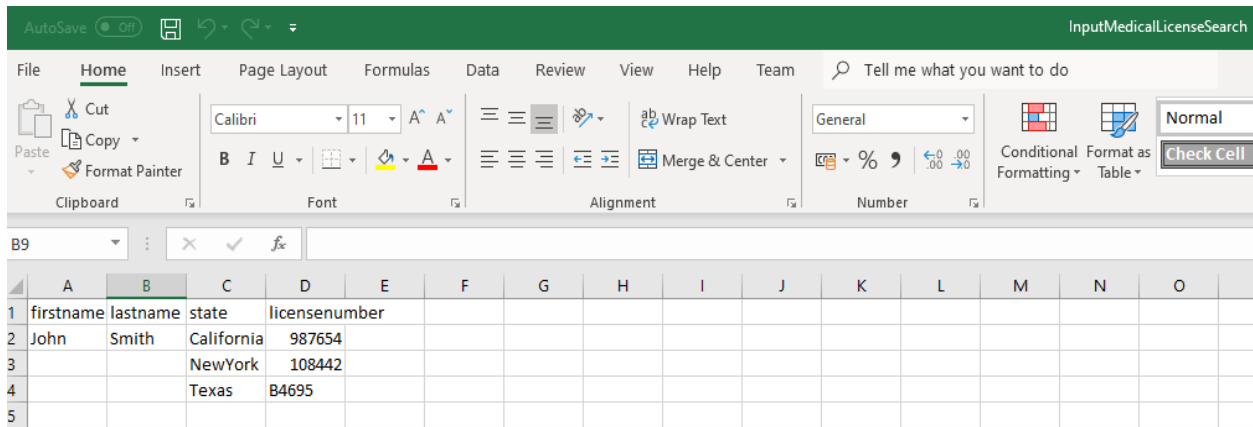
 InputMedicalLicenseSearch.CSV

 - **Required parameters:**

File Parameter Name	Type	Description	Example Input
state	Text	State issuing physician's license Accepted values: **California, New York, Texas, Virginia, and Georgia**	California

- **Optional Parameters -**

(If you don't want to add any value in the parameter leave it empty)

File Parameter Name	Type	Description	Example Input
firstname	Text	First name of physician	John
lastname	Text	Last name of physician	Smith
licensenumber	Text **(Required if state is New York)**	License number of physician	B11111

Example:

➢ **Output CSV Files-**

CaliforniaOutput.CSV

File Parameter Name	Type	Description	Example Output
Name	Text	Name of physician	Smith John C
License Number	Text	License number of physician	G 11111
License Type	Text	License type	Physician and Surgeon G
License Status	Text	Status of license	License Cancelled - License has been voluntarily cancelled or the license has been expired for at least five years and has not been renewed. No practice is permitted.
Expiration Date	Text	Expiration date of license	November 30 2015
Secondary Status	Text	Administrative action taken by other state or federal government	Probation Completed
City	Text	Home city of physician	PASADENA
State	Text	Home state of physician	California
County	Text	Home county of physician	LOS ANGELES
Zip	Text	Zip code of home city	91101

Example:

GeorgiaOutput.CSV

File Parameter Name	Type	Description	Example Output
Name	Text	Name of physician	Smith John C
License Type	Text	License type	Physician
Status	Text	Status of license	Active
License #	Text	License number	27916
Address	Text	Address of physician	LAGRANGE GA 30240

Example:

NewYorkOutput.CSV

File Parameter Name	Type	Description	Example Output
Name	Text	Name of physician	Smith John C
Address	Text	Address of physician	NEW YORK NY
Profession	Text	Profession of physician	Medicine
LicenseNumber	Text	License number	234567
Date of Licensure	Text	License issue date	02/08/2001
Status	Text	Status of license	LICENSE REVOKED
Medical School	Text	Medical school of physician	SUNY BUFFALO
Degree Date	Text	Degree completion date	06/01/1989

Example:
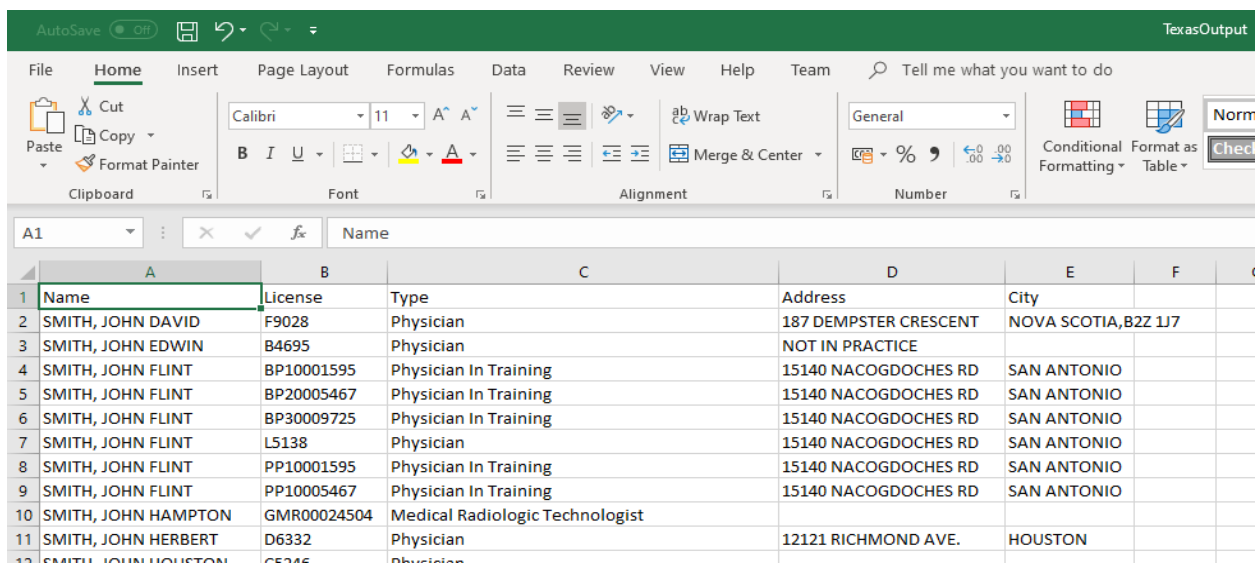
TexasOutput.CSV

File Parameter Name	Type	Description	Example Output
Name	Text	Name of physician	Smith John C
License	Text	License number of physician	F11111
Type	Text	Physician type	Physician
Address	Text	Address of physician	123 DEMPSTER CRESCENT
City	Text	Home city	SAN ANTONIO

Example:

VirginiaOutput.CSV

File Parameter Name	Type	Description	Example Output
Name	Text	Name of physician	Smith John C
Address	Text	Address of physician	123 DEMPSTER ROAD
Expire Date	Text	Expiry date of license	06/30/2020
Additional Public Information	Text	Additional information about physician	(None)

Example:

	A	B	C	D
1	Name	Address	Expire Date	Additional Public Information*
2	Certified Substance Abuse Counselor			
3	John K Smith	Ennice, NC 28623-9207	06/30/2020	No
4	Dentist			
5	JOHN C SMITH Jr.	ASHLAND, VA 23005	03/31/2017	Yes
6	Funeral Service Intern			
7	John W Smith	Scottsville, VA 24590	01/31/2004	No
8	Funeral Service Licensee			
9	John W Smith	Scottsville, VA 24590	03/31/2020	No
10	Licensed Clinical Social Worker			
11	JOHN V SMITH Jr.	Scranton, PA 18510-1307	06/30/2005	No
12	Licensed Massage Therapist			
13	John D Smith	ALEXANDRIA, VA 22312	08/31/2021	No
14	Licensed Nurse Practitioner			
15	John R Smith	New York, NY 10009	12/31/2011	No
16	Medication Aide			
17	Johnaria Smith	Fredericksburg, VA 22401	01/31/2021	No
18	Medicine & Surgery			
19	John R Smith	Martinsville, VA 24115-3911	07/31/2016	No

4. Reports
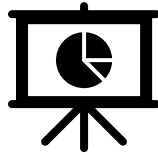
There are no Bot Insight Reports generated for this Bot.

5. Logs

In case of Errors, Error Logs & Screenshots are generated within Error Folder (Highlighted below in yellow)

- o My Tasks
  - ▪ Bot Store
    - • Bot Name
      - o Error Folder
        - ▪ Logs (Folder)
          - ▪ Error Logs Month-Day-Year Hour Min Sec.txt
        - ▪ Snapshots (Folder)
          - ▪ Error Snap Month-Day-Year.png

Error Logs will contain the below information -

- • Generated Timestamp

- • Task Name

- • Error Line Number

- • Error Description

Example:
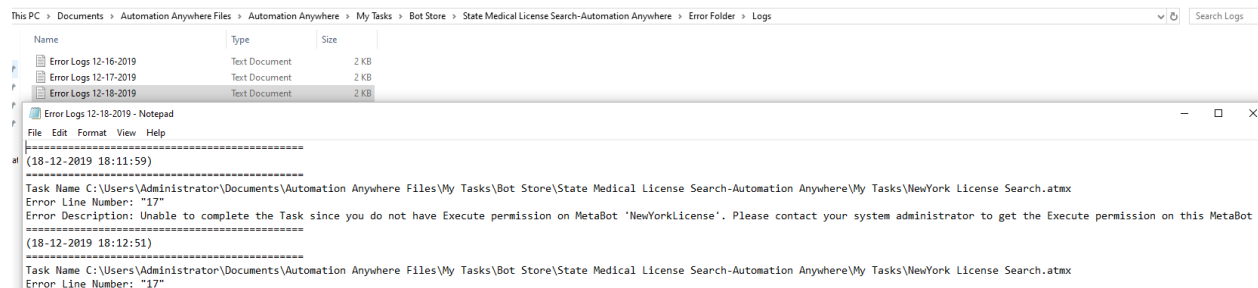
Example

Note: There are no Custom Logs generated for this Bot.

6. Troubleshooting & Support

Support

__Free bots are currently not supported directly.__

Questions on Bot Functionality or Feature can also be posted to our Community site Apeople

Automation Anywhere provides a Product Documentation portal which can be accessed for more information about AA's products and guidance on building bots and Digital Workers.
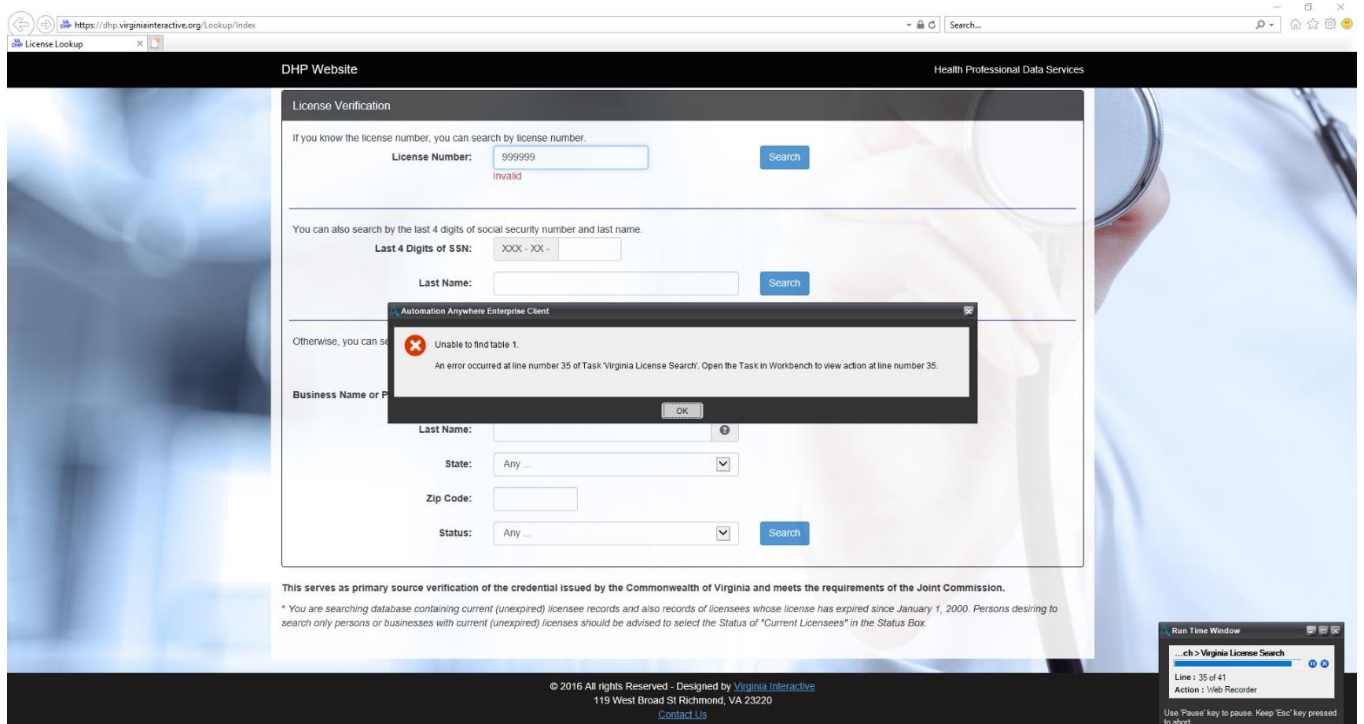
The "Build" section of the portal includes these sections:

- Getting Started - information on building bots recommended practices (including use of the Credential Vault)
- Build Advanced Bots - details on MetaBots and the approach to integrating code into them
- Build Digital Workers - high level architecture

FAQs

Q: The 'Create Locker' button is not visible in the Credential Vault Page. What do I do?

A: Please check if the role 'Locker Consumer' is assigned to the user and you are using an Enterprise Client version.

Appendix A: Record of Changes

No.	Version Number	Date of Change (DD/MM/YYYY)	Author	Notes
1	1.0	16/12/2019	Automation Anywhere	Version 1 Release

Appendix B: Acronyms

No.	Acronym	Description
1	AA	Automation Anywhere
2	CSV	Comma Separated File
3	DW	Digital Worker
4	CR	Credential Vault
5	CRM	Customer Relationship Management
6	API	Application Programming Interface
7	PC	Personal Computer
8	RAM	Random Access Memory
9	OS	Operating System

Appendix C: References

No.	Topic	Reference Link
1	System Requirements – Client	*Click here*
2	System Requirements – Control Room	*Click here*
3	How to create a Credential & Locker?	*Click here*
4	Credential Overview	*Click here*
5	A-People Community Site	*Click here*
6	Product Documentation Portal	*Click here*