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1.   Introduction

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

Overview

This bot helps to download the extracted results from the uploaded invoices for all the IQ Bot instances based on Credential vault variables or configurable parameters in excel file

2.   Requirements & Prerequisites

2.1   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..

2.2   Prerequisites

• **Software's needed -**

- ✓ AA Enterprise Client 11.3.x
- ✓ AA Enterprise Control Room 11.3.x / Community Edition
- ✓ AA Enterprise IQ Bot (respective version)
- ✓ Excel 2016 (preferred)

• **Accounts/License needed –**

- ✓ AA Enterprise License / Community edition
- ✓ AA IQ Bot account details

2.3   Security Measures

There are some security best practice recommendations that we may follow with bot.

- ✓ It is not recommended to provide user login details in Excel template, to avoid unintended changes/loss of user data
- ✓ It is recommended to provide sensitive data in Credential vault.

3.   Getting Started

3.1   Skill Matrix

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

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

| Skill	Task Files	MetaBot Files
Extract data based on user account and instances provided in list	IQBOT_Download.atmx	No Metabots

3.2   Installation Hierarchy

Installation

- Download the bot from Bot Store.
- Install / run the .msi file downloaded from Bot Store. Or Unzip the zip archive.
- For **first time users**, create "**Bot Store**" folder under **<AA Directory>/My Tasks** *(on your local disk)*.
- Copy folder "**IQBot Download**" to above created Bot Store folder inside **<AA Directory>/My Task** in Automation Anywhere folder on your local disk.

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

<AA Directory>
- o   My Tasks
  - ▪   Bot Store
    - •   IQBot Download (Folder)
      - o   My Task
        - ▪   **IQBot Download**.atmx
      - o   Error Folder
        - ▪   Logs (Folder)
          - •   Error Logs Month-Day-Year.txt
        - ▪   Snapshots (Folder)
          - •   Error Snap Month-Day-Year.png

Bot Deployment

<AA Directory> view at your local machine
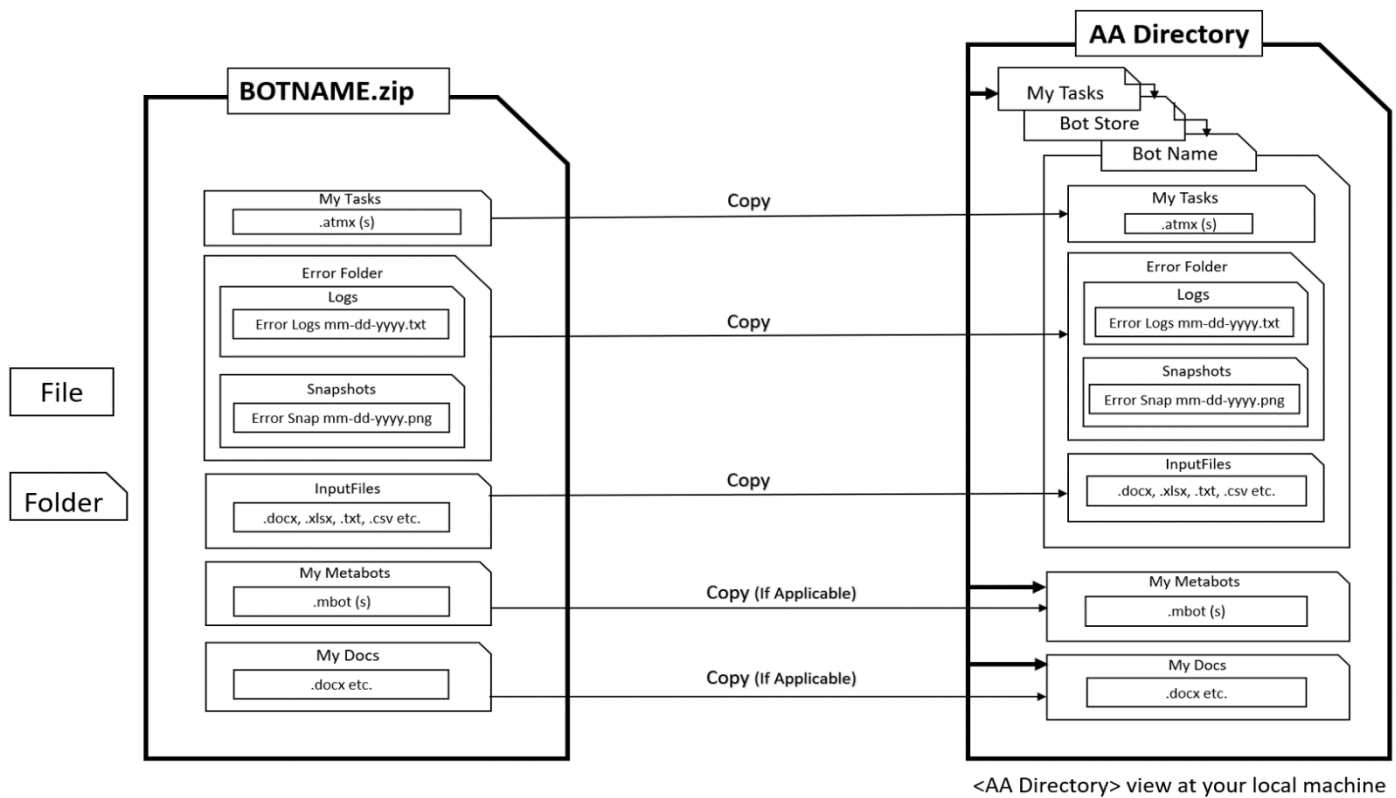
3.3   Quick Start

3.3.1   Setup

Use the following information to configure external inputs to bot:

Input Excel – you can find it in "$AAApplicationPath$\Automation Anywhere\My Tasks\Bot Store\IQBot Download\Input Files\IQ_Config.xlsx". update sheets as stated below.

Config Sheet –

Credential_Flag: - use credential flag to determine whether to read values from Control room credential vault or from excel or we can update values in variable manager.
possible values as stated below.

1. True – we need to create locker, credential variables in Control Room & we need to update IQBot_URL value in IQBot_Config file - Config sheet - B2.
2. False – we need to update values in IQBot_Config excel file - Config sheet – B2, C2 & D2
3. Blank or Any other value -- we need update the variables (IQBot_URL,

IQBot_Login_UserName, IQBot_Login_Password) in Task Bot – Variable Manager.

Output_Path (E2 Value in excel file): - Already defined in Variable manager, no need to add value unless want to change location of extracted result path.

Instances sheet – we need to provide the list of instances for those we wish to extract the results.

3.3.2   Configuration

STEP 1 (Configuring Credential in Control Room's Credential Vault)

Passwords and other sensitive information such as user credentials should be stored as credentials centrally in the Credential Vault.

These sensitive data items become secured (stored in CR) and can't be accessed locally which is used by the bots when it executes in the machine

Below are the step-by-step instructions for what needs to be done to set up the URL, Username and Password for IQBot in the Credential Vault.

- 'Locker Consumer Role' needs to be assigned to the AA user (bot runner) which ensures the user have full access to the locker.
- Locker needs to create with name as "IQBot_Locker"
- Credential needs to create with name as "Credential_IQBotDownload", where the URL, Username and password need to be saved.

Locker Name	Credentials Name	Attribute Name	Value
IQBot_Locker	Credential_IQBotDownload	IQBot_Authentication	IQ Bot Authentication URL, Ex-https://***********.automationanywhere.digital/v1/authentication
IQBot_Locker	Credential_IQBotDownload	IQBot_Login_Json	IQ Bot login credentials Json, Ex-{"username": "IQBotUsername", "password": "******"}

STEP 2 (following information to configure your bot)

Parameter Name	Type	Direction	Additional Info
vIQBot_URL	String	Input	Provide IQ Bot URL.
vIQBot_Login_UserName	String	Input	Provide IQ Bot Login Username.
vIQBot_Login_Password	String	Input	Provide IQ Bot Login Password.
vInstanceList	List	Input	Bank Statements, Invoices, etc..
vOutput	String	Input	**DON'T** change this variable, if you wish to customize this output path then do provide in IQBot_Config file
vResponse	String	Output	Returns a string containing all the content from a file
vErrorFolder	String	Input	This is error folder inside bot folder which contains Logs and Snapshots folder (Already defined, no need to add value unless want to change location of file).
vLogFolder	String	Input	This folder contains Log file in case of error (Already defined, no need to add value unless want to change location of file).
vLogFile	String	Input	This file contains Log details in case of error (Already defined, no need to add value unless want to change name of file).
vSnapshotFolder	String	Input	This folder contains Screenshot in case of error (Already defined, no need to add value unless want to change location of file).

4.   Reports

There are no Bot Insight Reports generated for this Bot.

5.   Logs

Error Handling

- Each Bot folder contains the below hierarchy.
  <AA Directory>
    o My Tasks
      ▪ Bot Store
        • IQBot Download (Folder)
          o Error Folder
            ▪ Logs (Folder)
              • Error Logs Month-Day-Year.txt. In case of any error, this file logs error message along with time stamp
            ▪ Snapshots (Folder)
              • Error Snap Month-Day-Year.png: In case of any error, this file captures screenshot of error.

   Task Status of bot is set to failed in case of error.

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