Weekly Travel Planner (Outlook)

Readme

Version 1.0

24/02/2022

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1.   Introduction

This document contains all essential information for the user to make full use of this Automation 360 - Weekly Travel Planner (Outlook) bot. It includes the description of the functions and capabilities and step-by-step procedure for setup & configuration of the Bot. This bot sends a mail to user with a file containing next week event details with weather information.

1.1   Overview

The Weekly Travel Planner (Outlook) bot is designed to demonstrate how Automation Anywhere's RPA tool enables a user to generate a report on his next week travel or event plan. Here is the scenario built with this bot: Weekly Travel Planner (Outlook) bot connect with Microsoft outlook calendar and Microsoft azure to fetch next week events details. This task is done with the help of REST web services command package and Microsoft graph API. These fetched details with additionally added weather information of the meeting location send to user in a mail.

1.2   Use cases

The key use cases include:

- Create folders with specified name on shared relative path.
- Create files in folders with specified name on shared relative path.
- Set credentials in an excel file with user entered details (except password, considering safety).
- Connect with Microsoft outlook and MS Azure using MS Graph API.
- Fetch the details of next week events.
- Fetch the weather information of meeting locations.
- Send a mail to user with a file containing all fetched details.

2. Requirements & Prerequisites

2.1 System Requirements

Automation 360 (Cloud deployed) and Community Edition device requirements.
Review the machine hardware specifications, operating system versions, and browser types supported by Automation Anywhere Enterprise for creating and running bots and command packages as an Automation 360 (Cloud deployed) or Community Edition user on your local machine.

2.2 Prerequisites

- Automation 360 setup to run in your machine.
- Bot creator license.
- Microsoft Excel.
- Microsoft identity platform credentials (tenant ID, client ID, Client secret ID are needed)
- Microsoft Outlook with connected email account (username and password needed).

3.   Getting Started

3.1   Quick Start

3.1.1   Setup

• Install the Bot from Bot Store into your Control Room.
• Navigate to Weekly Travel Planner (Outlook) bot folder within the Bot Store folder to examine the installed bots.

3.1.2   Configuration and Use

Weekly Travel Planner (Outlook) bot used to perform the following functionalities

- Fetch event details for next week
- Find weather of the location
- Send a mail with meeting details to user

The initial bot run prompt user to enter credentials. User need to type the username and password of the Microsoft outlook and tenant, client id and client secret of the Microsoft identity platform and the email address to send the output file.

The bot will save all credentials except password in an excel sheet named 'User Credentials.xlsx' available at 'Approot folder'. After a successful bot run, bot will prompt for autologin in next run onwards. If user opt for auto login, then only need to enter password of the outlook mail because bot will fetch all other credentials from credential file. If user does not opt for auto login, then bot will wipe out all previous credentials stored in credential file and prompt for new credentials.

User can also manually set the credentials in credential file, 'User Credentials.xlsx' located in user folder inside Approot.

Dependencies or Pre-requisites for the initial setup:

Registering your application establishes a trust relationship between your app and the Microsoft identity platform.

Hints:

- App registration : https://docs.microsoft.com/en-us/azure/active-directory/develop/quickstart-register-app
- Configure app expose web api: https://docs.microsoft.com/en-us/azure/active-directory/develop/quickstart-configure-app-expose-web-apis
- Permission type**:** Delegated (work or school account)
- Microsoft Graph (User.Read, User.Read.All).

Important variables used in the Initialize Bot

Variable Name	Type	Mandatory	Purpose	Value/Additional info.
sApproot	Text	Yes	Root directory where the Process related folders exist	C:\ProgramData\AutomationAnywhere\Weekly Schedule Assistant
sUserFolder	Text	Yes	Path where the Credential file located	C:\ProgramData\AutomationAnywhere\Weekly Schedule Assistant\User
sOutputFolder	Text	Yes	Path where the Output file located	C:\ProgramData\AutomationAnywhere\Weekly Schedule Assistant\Output
sLogFolder	Text	Yes	Path where the log file located	C:\ProgramData\AutomationAnywhere\Weekly Schedule Assistant\Log Folder
sTenant	Text	Yes	Credential used to generate access token from MS graph API	One of the MS identity platform generated credential.
sAccess_token	Text	Yes	The key received from MS graph API to securely access data.	With this key REST web service identify the request.

4. Support & FAQs

4.1 Support

Free bots are not officially supported. You can get access to Community Support through the following channels:

- You can get access to Community Support, connecting with other Automation Anywhere customers and developers on APeople – the Bot Building Forum, the Bot Store Support Forum, or the Developers Everywhere Group.
- Automation Anywhere also provides a Product Documentation portal which can be accessed for more information about our products and guidance on Automation 360.

4.2 FAQs

Q: Can I make changes to this process/bot?

A: Absolutely. Free process/bots are for you to make use of, customize, and/or include in your builds as you see fit.

Q: Can I upgrade the packages for this bot?

A: Yes – but know that the bot was created/tested on a specific package version. Any modifications to that may result in unexpected outcomes – so make sure to test the bot/subtask after making any package version modifications.

For questions relating to Automation 360: See the Automation 360 FAQs.

Appendix A: Record of Changes

No.	Version Number	Date of Change	Author	Notes
1	*1.0.0*	*24-02-2024*	*Livin Vincent*	*Initial version of the process*

Appendix B: References

No.	Topic	Reference Link
1	Overview of Automation 360	Click here
2	Guidance: Building basic Automation 360 bots	Click here
3	Guidance: Building Automation 360 action packages	Click here
4	APeople Community Forum	Click here
5	Automation Anywhere University	Click here