Automai RPA (Robotic Process Automation)

Installation Guide

Contents

Before the installation

The Automai RPA suite consists of three components – *The Manager, rWorker,* and *ScenarioBuilder*. Together, they comprise Automai's Robotic Process Automation solution.

Install the Automai RPA components in the following manner:

1. **The Manager –** Install on a Windows PC or Windows Server. A web based application from which Process flows are built, managed and executed. It also generates summarized and detailed run results and reports.

2. **Robot Worker (rWorker) –** Install on a Windows PC or Windows Server. The robot that executes the Process flows defined in the Manager.

   ⚠️Make sure that the Manager is already installed before installing the rWorker.

3. **ScenarioBuilder –** Install on a Windows PC or Windows Server. The tool for recording and maintaining automation scripts.

💡Automai RPA components can be installed on either physical or virtual machines.

Install Automai RPA suite

Start by downloading the Automai RPA installation package from the *Downloads* page on the *Automai website*. And save the RPA, rWorker and ScenarioBuilder setup files to your Windows PC or Windows Server.

Prerequisite software

Specific software needs to be installed before you can install Automai RPA. When you run the installation wizards ("RPASetup.exe", "rWorkerSetup.exe", "SBSetup.exe"), if the prerequisite software is not already installed on your computer, the wizard detects which software is missing. If you continue with the installation, all missing prerequisites will be installed.

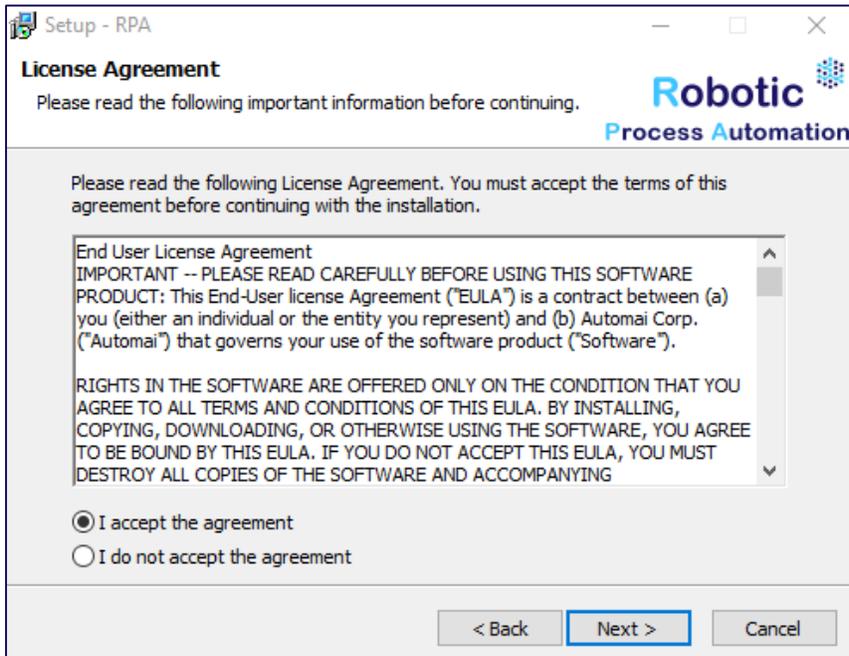The following prerequisite software need to be installed:

- .NET Framework 4.0 and 4.5
- Microsoft Visual C++ 2015 Redistributable (x64)
- Microsoft Visual C++ 2015 Redistributable (x86) – This is required for ScenarioBuilder and rWorker.

Install the Manager
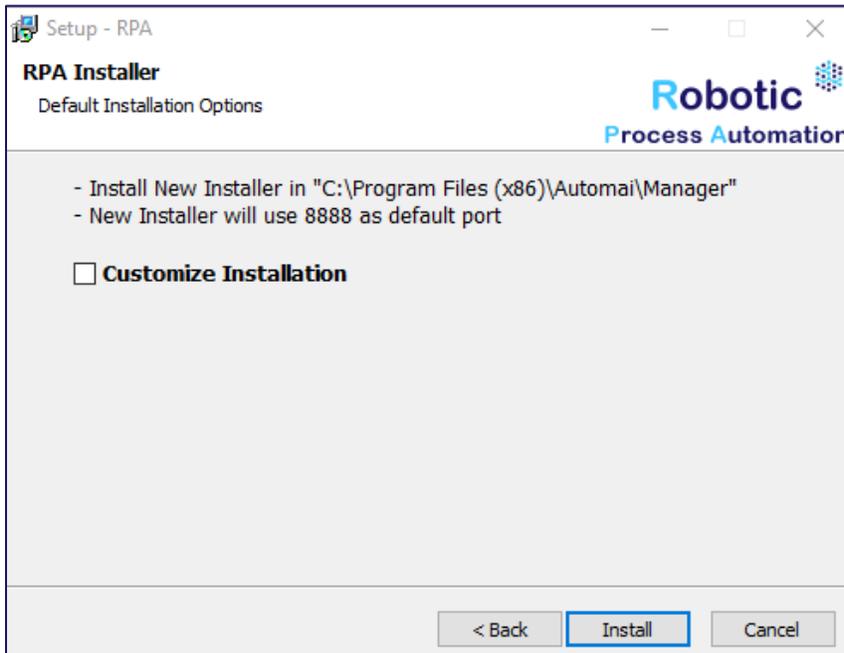
1. Run the *RPASetup.exe* file.
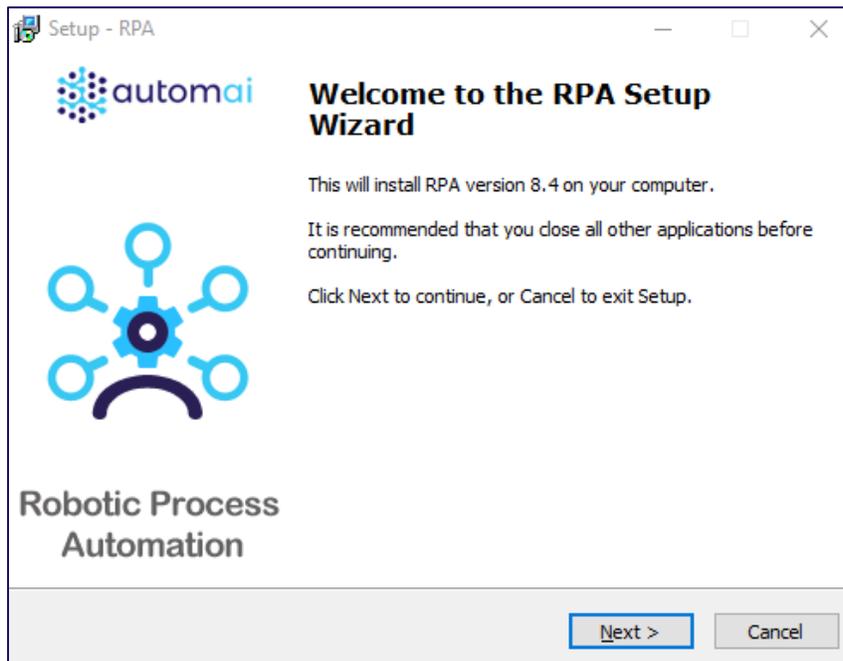
2. Click "Next" to advance to the "End User License Agreement" (EULA).

> Review the terms of the EULA and click "I accept the agreement" and click "Next" to continue.

3. Click "Install" to accept the default settings and initiate the installation process.
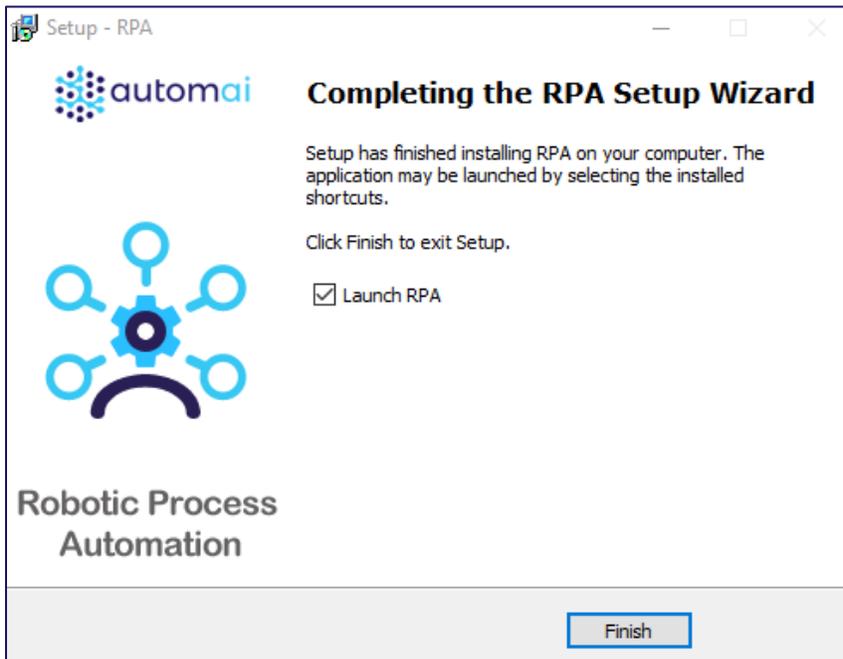

Use "Customize Installation" option if you want to modify the destination folder and Web Server port configuration for the Manager installation.
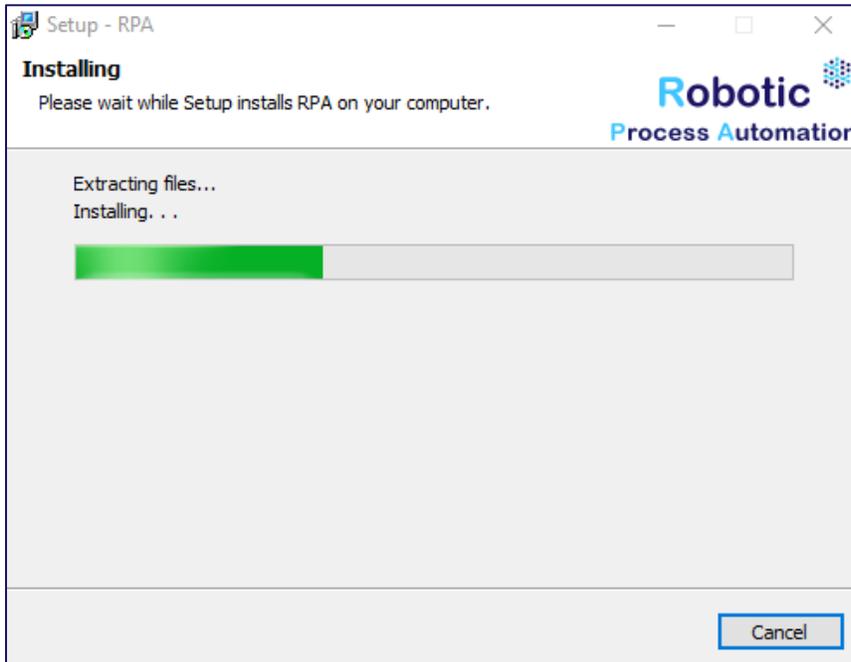
4. Click "Finish" to complete the Manager installation.

Install rWorker

The rWorker installer is split into two main modules, each being dedicated to a particular task in Robotic Process Automation. The rWorker modules are:

- **Robot Worker (rWorker):** The robot that executes the Process flows defined in the Manager.
- **Sessions Controller:** Automai Sessions Controller is a service for robots (ScenarioStation, rTester, rWorker) to maintain sessions active in order for the scenario images to be buffered and to prevent any connection errors during scenario playback. It can start automatically and run in background while executing processes (scenarios/scripts) without human supervision. For more information, see here.

1. Run the *rWorkerSetup.exe* file.
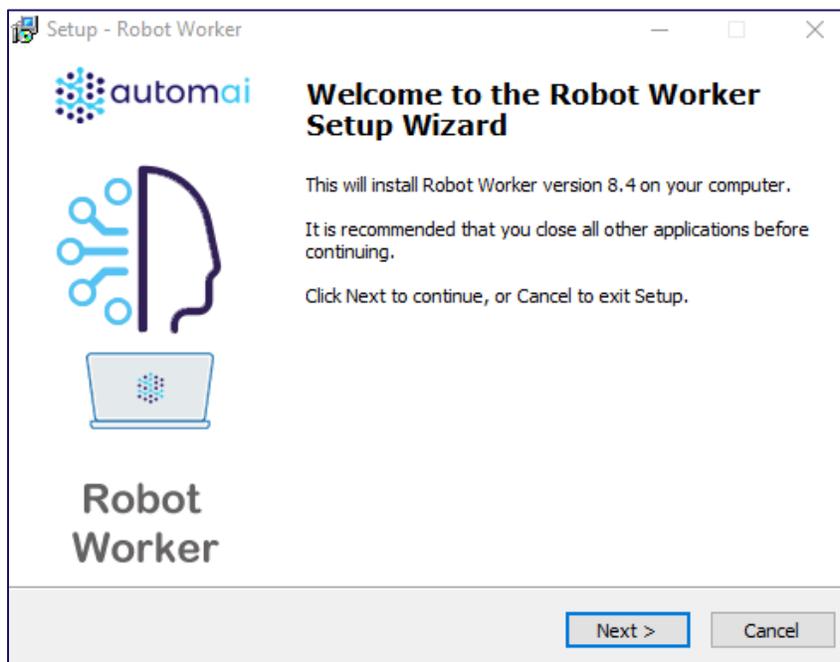
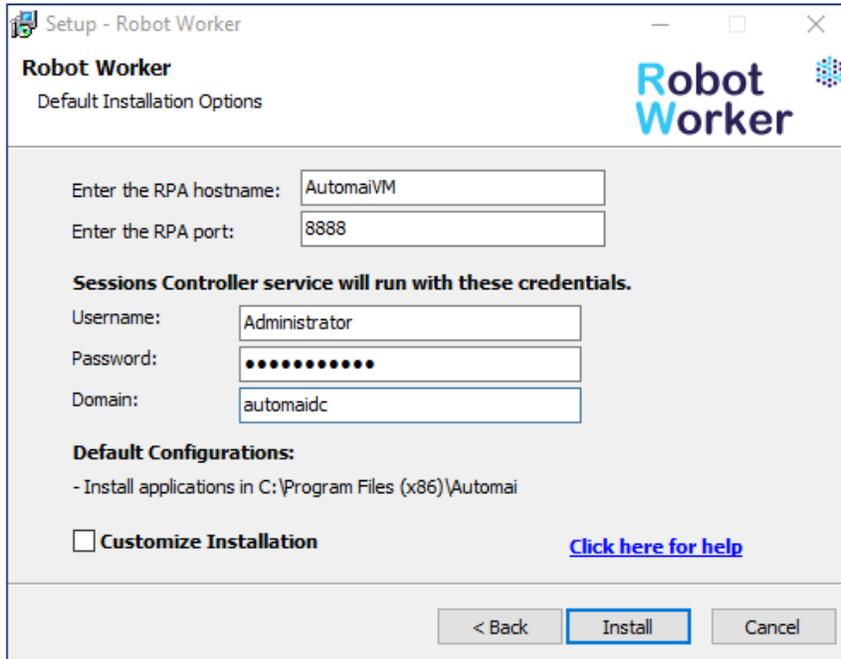2. Click "Next" to advance to the "End User License Agreement" (EULA).
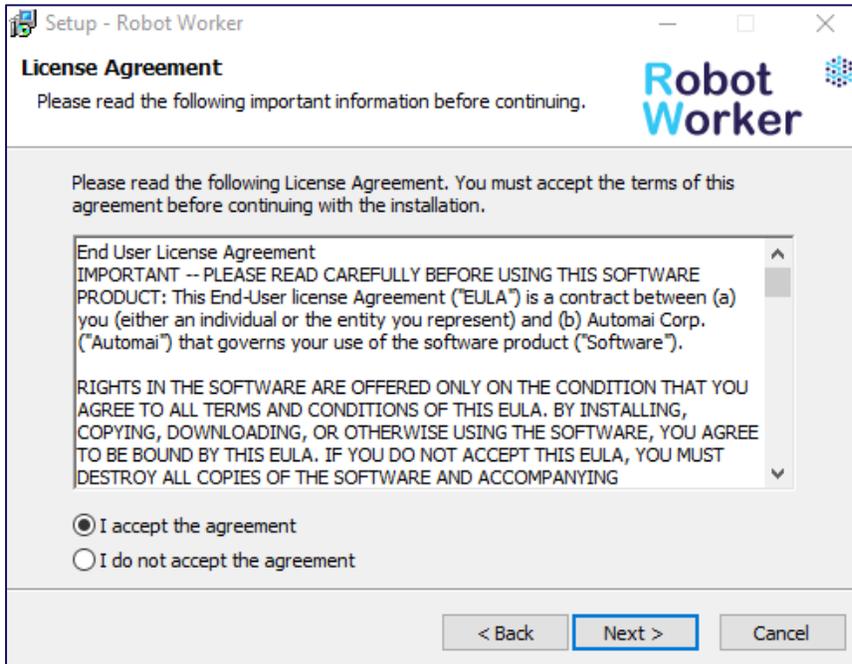
Review the terms of the EULA and click "I accept the agreement" and click "Next" to continue.

3. Enter the hostname of the machine where the Manager is located.

    Enter the "Port Number" address – use the same port that was assigned for "Web Server Port" in the Manager installation. (Choose the default one: "Port Number: 8888").

    Next, enter a correct user credential (username [domain if needed] and password used to login to the Windows machine where Sessions Controller and robot are being installed), so the Automai Sessions Controller service can start and run. Please refer to this article to learn more about Sessions Controller.
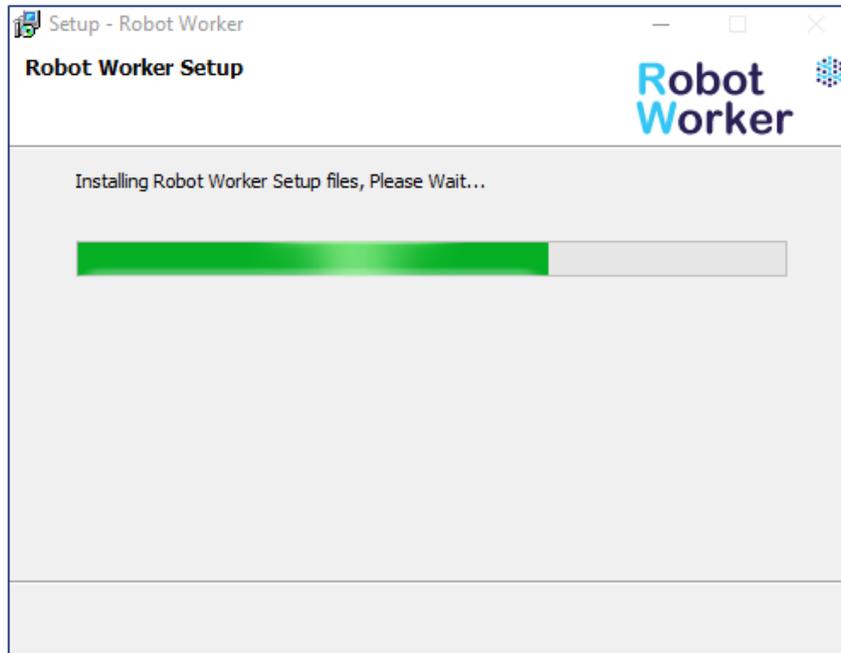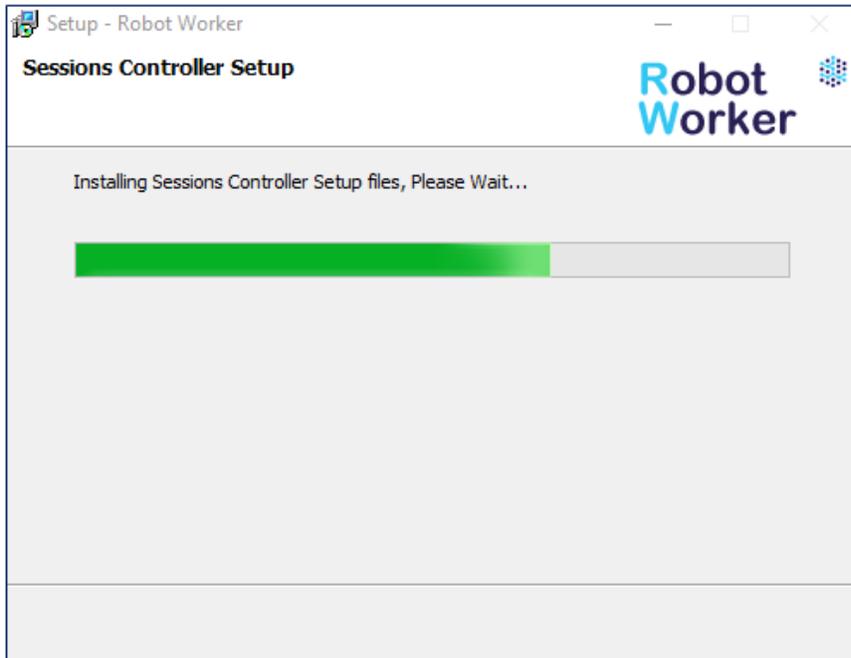
Click "Install" to accept the default settings and initiate the installation process.

4. Click "Finish" to complete the rWorker and Sessions Controller installation.
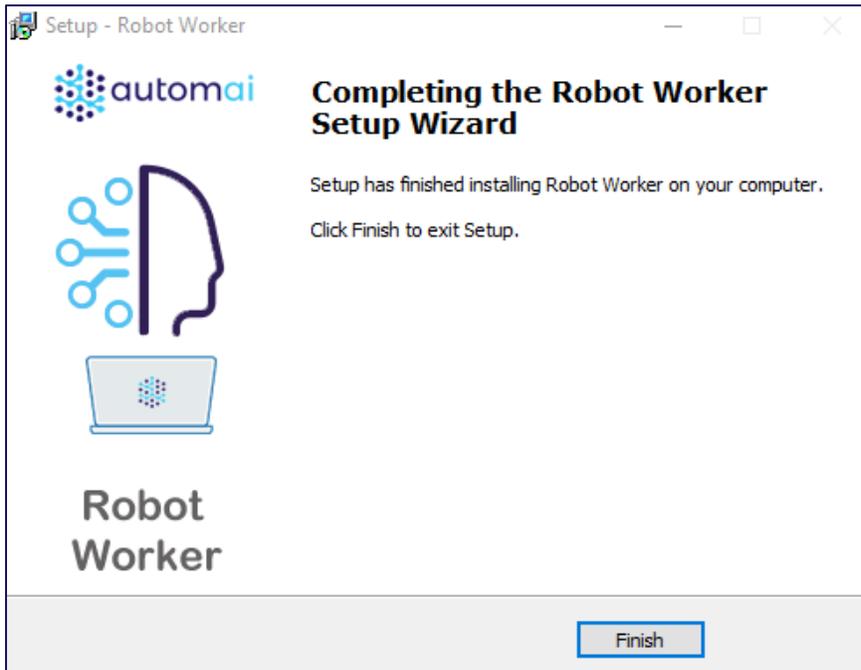
Tip The installation can also be customized, to better suit your needs. Choose "Customize Installation" option if you would like to use non-default settings.

Select the modules that you want to install on this page and click "Next".
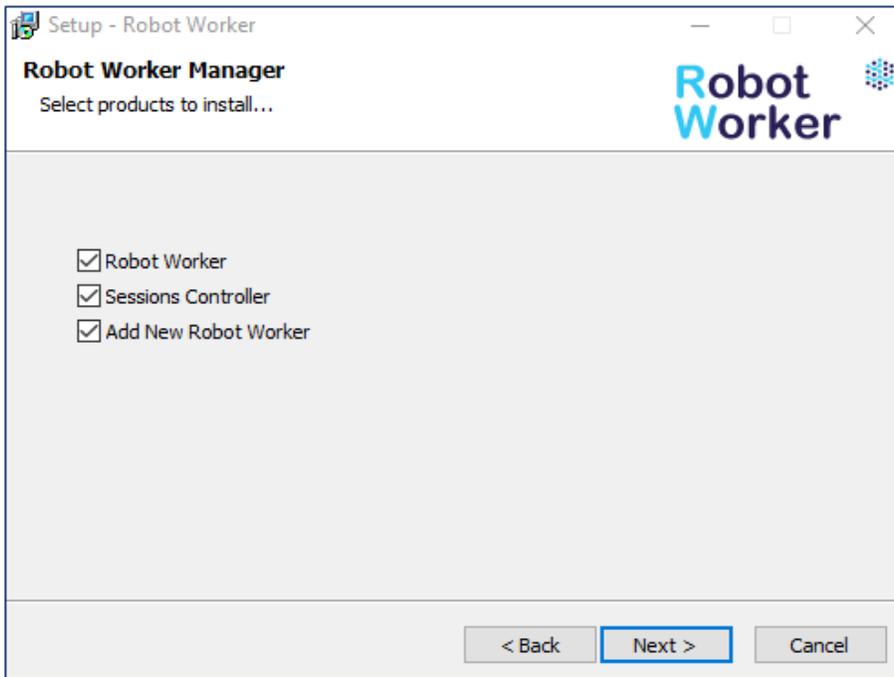
Please note that, by default, Sessions Controller and robots are installed at the following location "C:\Program Files (x86)\Automai\..." folder. You can change it by using "Customize Installation" option.
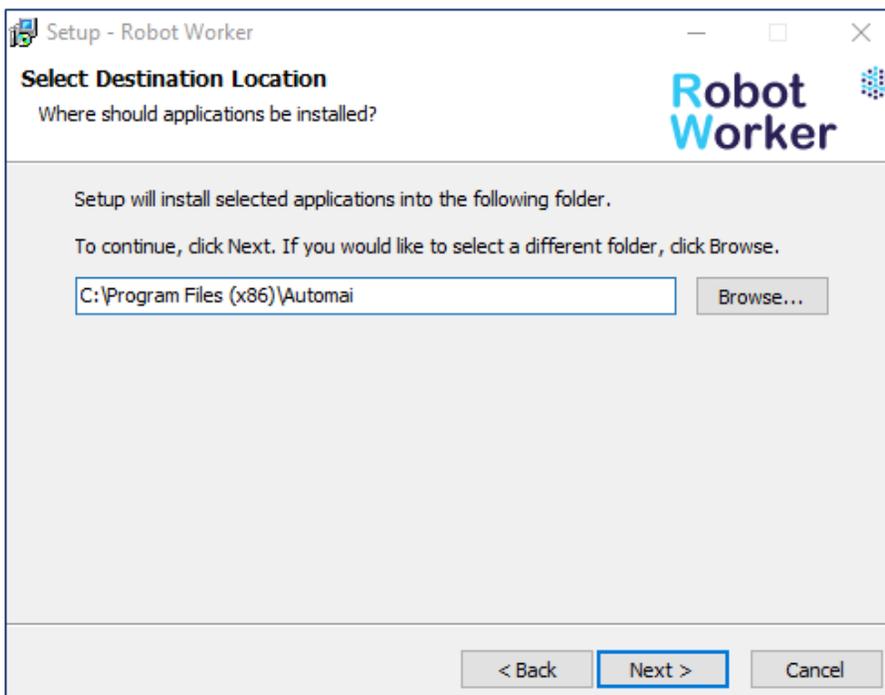
Tip Use the "Add new Robot Worker" option and follow the instructions to add a new Robot Worker for a user dedicated to it. This only applies if you install rWorker in a Windows Server.
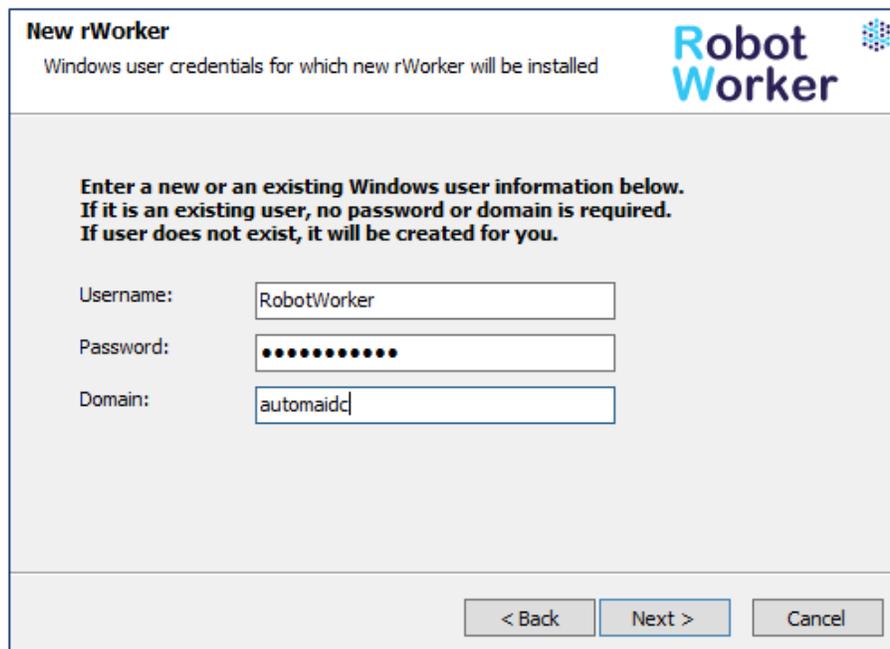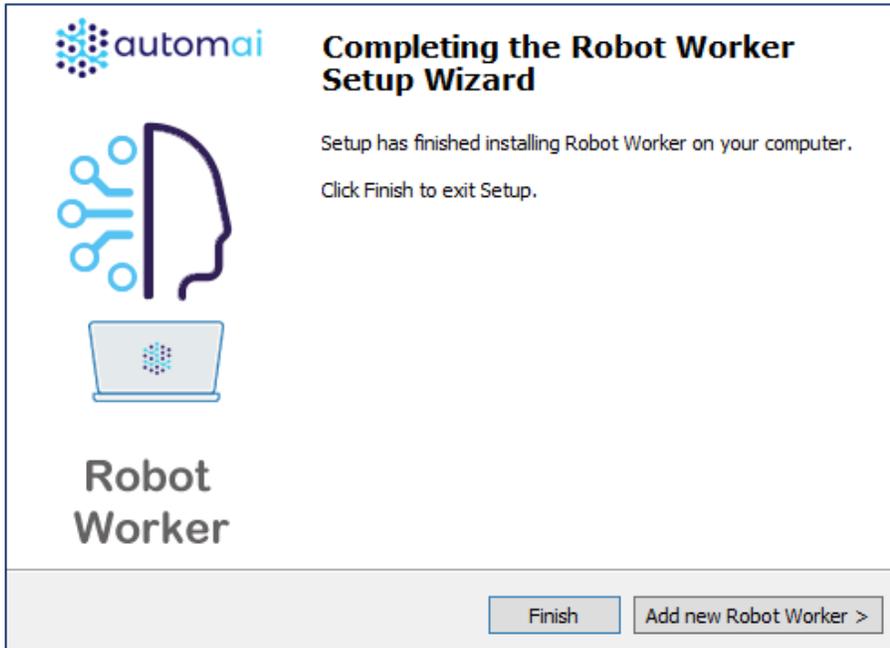
You can install as many Robot Workers as you need within different user accounts in the server.

💡By default, Sessions Controller creates a user session using default RDP settings with Automai Sessions Controller service running for each user once rWorker is installed. You may change the settings by launching the Sessions Controller app and going to "Manage sessions" section. To learn more, see this article.

💡Once rWorker is installed, it will start automatically. But if it does not start, you can start it from the rWorker's folder in program menu or by using the desktop shortcuts.
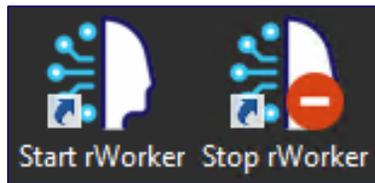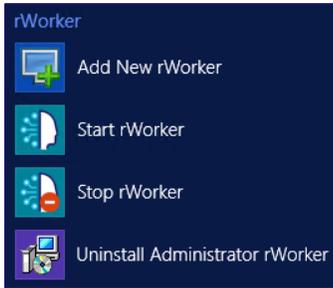
Install ScenarioBuilder

1. Run the *SBSetup.exe* file.
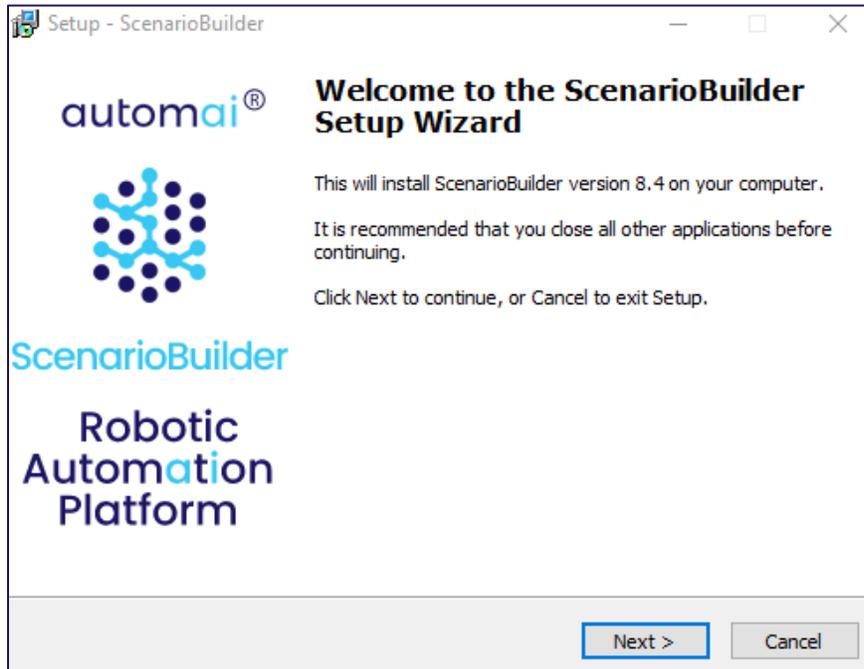
2. Click "Next" to advance to the "End User License Agreement" (EULA).
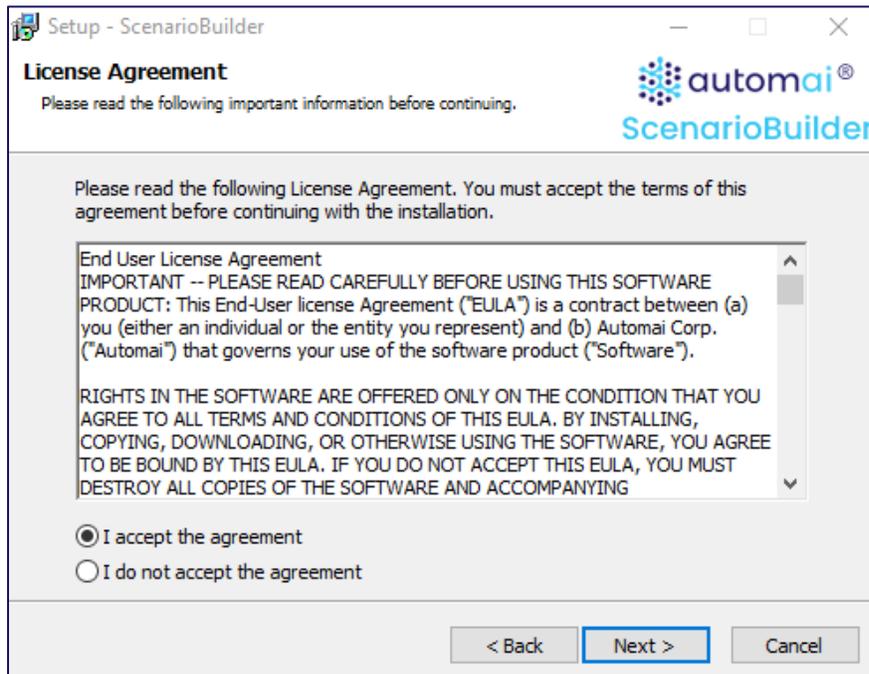
Review the terms of the EULA and click "I accept the agreement" and click "Next" to continue.

3. Enter the IP address of the machine hosting the Controller/Base in the "Host IP" field.

   Enter the "Port Number" address – use the same port that was assigned for "Web Server Port" in the Controller/Base installation. (Choose the default one: "Port Number : 8888"), then click "Next".
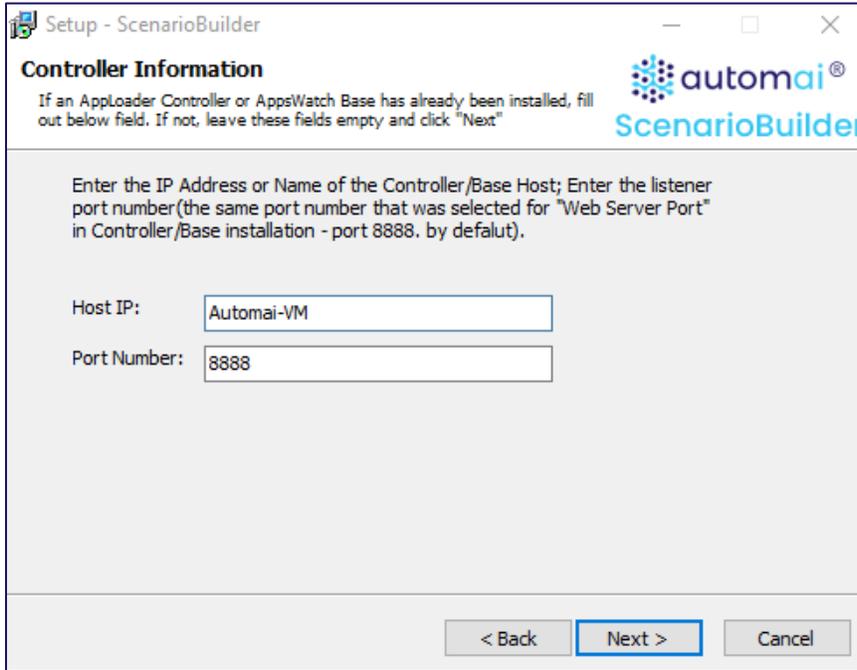
4. Select the destination folder for the ScenarioBuilder program installation. Click "Next" to accept the default location or "Browse" to an alternate location, then click "Next."
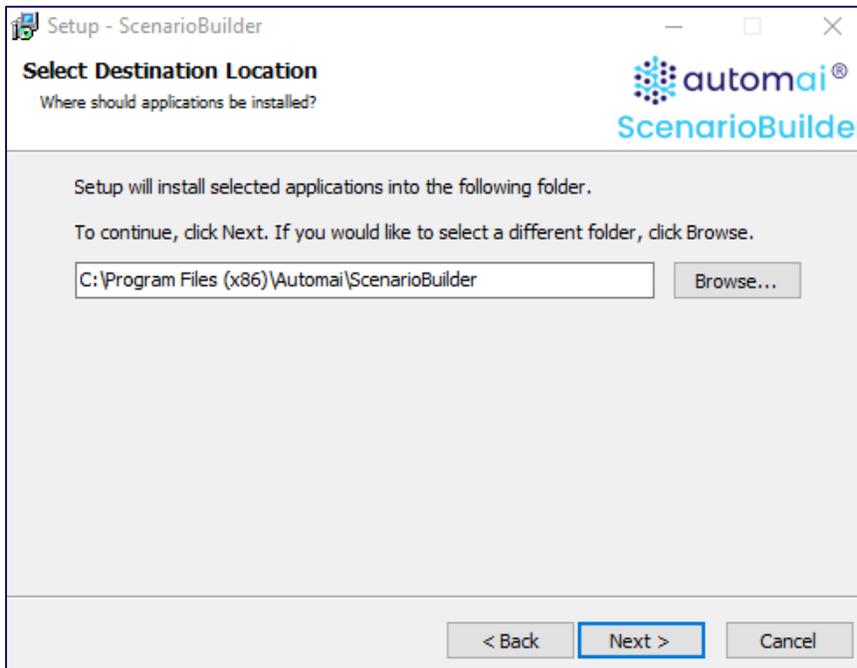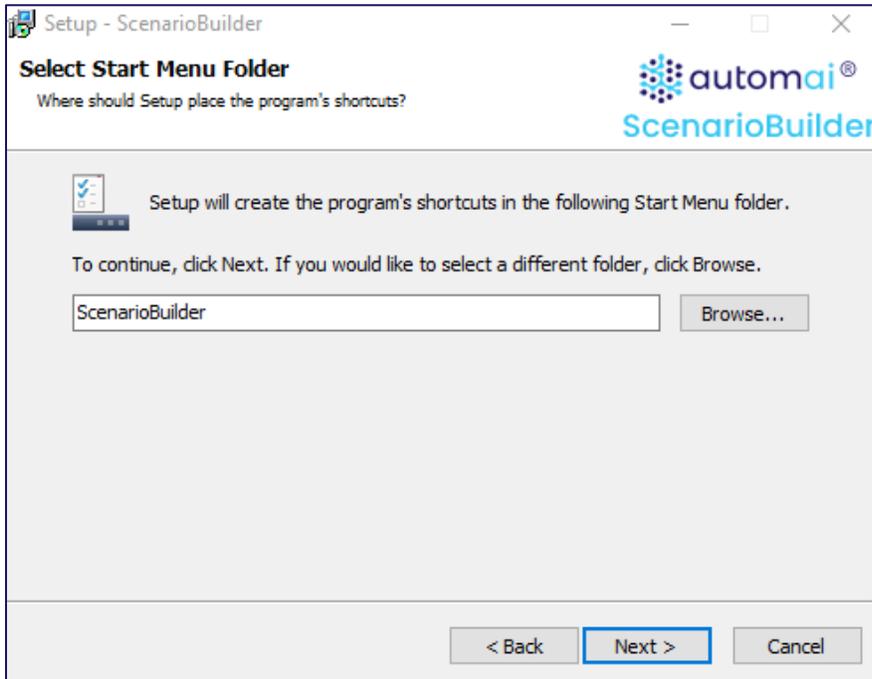
5. Review settings and click "Install" to initiate the installation process.
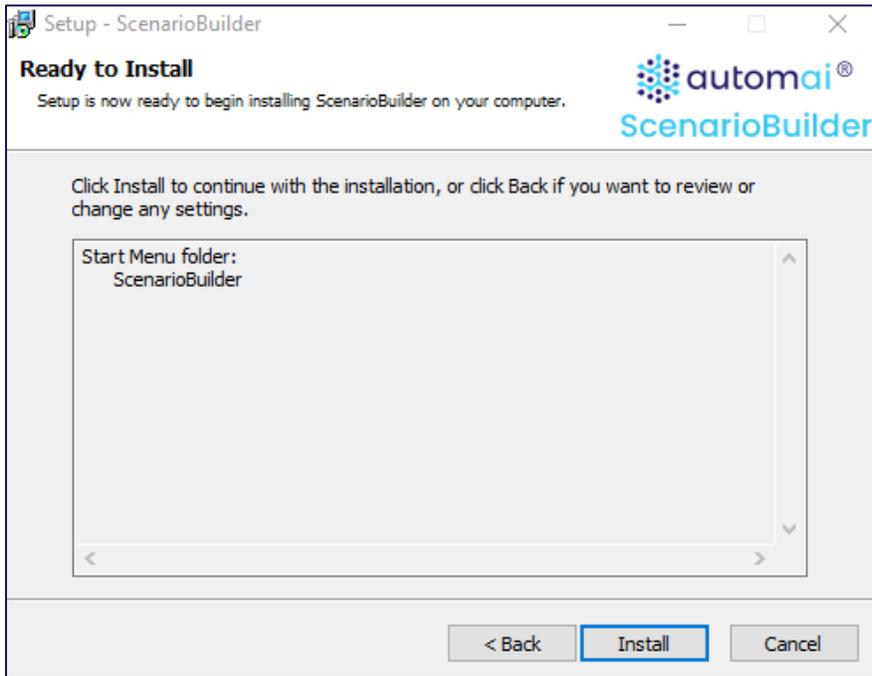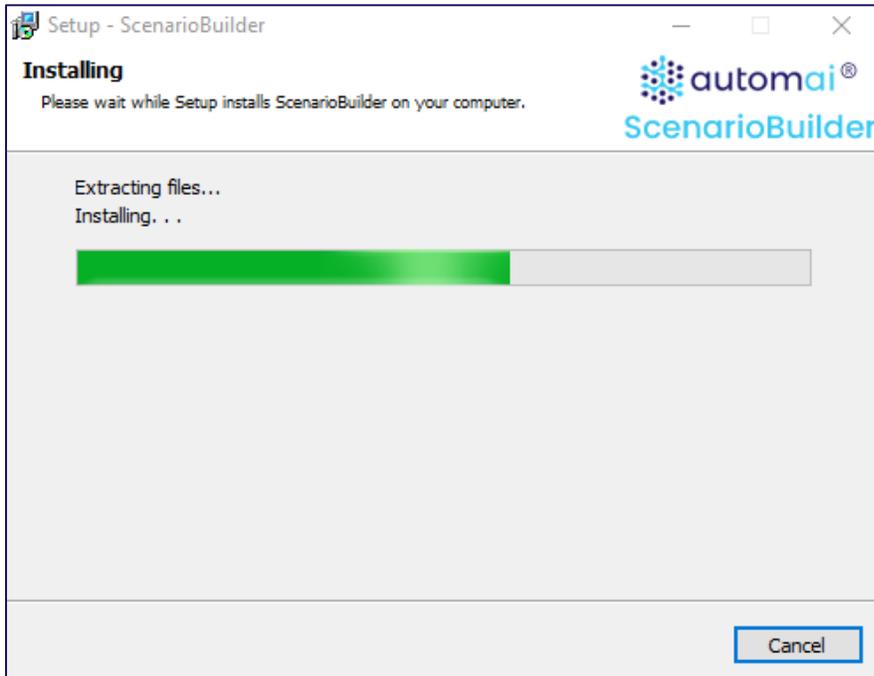
6. Click "Finish" to complete the ScenarioBuilder installation.
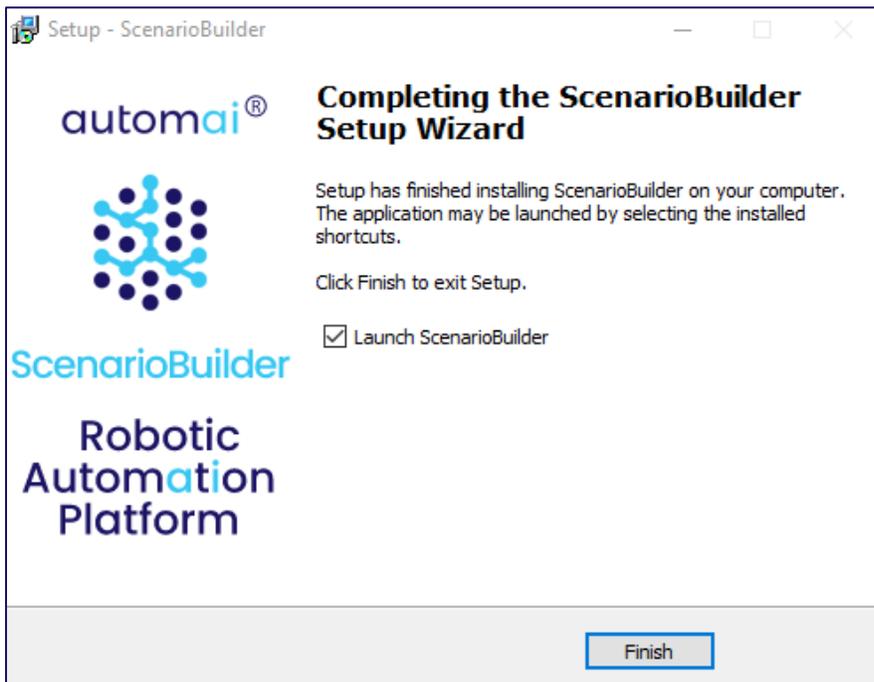
7. After finishing the installation, ScenarioBuilder will launch.

End user license agreement

IMPORTANT -- PLEASE READ CAREFULLY BEFORE USING THIS SOFTWARE PRODUCT: This End-User license Agreement ("EULA") is a contract between (a) you (either an individual or the entity you represent) and (b) Automai, Inc. ("AUTOMAI") that governs your use of the software product ("Software").

RIGHTS IN THE SOFTWARE ARE OFFERED ONLY ON THE CONDITION THAT YOU AGREE TO ALL TERMS AND CONDITIONS OF THIS EULA. BY INSTALLING, COPYING, DOWNLOADING, OR OTHERWISE USING THE SOFTWARE, YOU AGREE TO BE BOUND BY THIS EULA. IF YOU DO NOT ACCEPT THIS EULA, YOU MUST DESTROY ALL COPIES OF THE SOFTWARE AND ACCOMPANYING DOCUMENTATION WITHIN 1 DAY OF PURCHASE FOR A REFUND FROM AUTOMAI.

1. THIRD PARTY SOFTWARE. The Software may include, in addition to AUTOMAI proprietary software ("AUTOMAI Software"), software under licenses from third parties ("Third Party Software" and "Third Party License"). Any Third Party Software is licensed to you subject to the terms and conditions of the corresponding Third Party License. Generally, the Third Party License is located in a file such as license.txt or read.me file; you should contact AUTOMAI support if you cannot find any Third Party License.

2. LICENSE RIGHTS. You will have the following rights provided you comply with all terms and conditions of this EULA: a. Use. AUTOMAI grants you a license to Use one copy of the AUTOMAI Software. "Use" means installing, copying, storing, loading, executing, displaying, or otherwise using the AUTOMAI Software. You may not modify the AUTOMAI Software or disable any licensing or control feature of the AUTOMAI Software. Additional restrictions on Use may appear in the User Documentation. You may not separate component parts of the AUTOMAI Software for Use. You do not have the right to distribute the AUTOMAI Software. b. Copying. You may copy the AUTOMAI software for back-up and archival purposes, provided any copy contains all the original software's proprietary notices.

3. UPGRADES. To Use AUTOMAI Software provided by AUTOMAI as an upgrade, update, or supplement (collectively "Upgrade"), you must first be licensed for the original AUTOMAI Software identified by AUTOMAI as eligible for the Upgrade. To the extent the Upgrade supersedes the original AUTOMAI Software, you may no longer use such AUTOMAI Software. This EULA applies to each Upgrade unless AUTOMAI provides other terms with the Upgrade. In case of a conflict between this EULA and such other terms, the other terms will prevail.

4. TRANSFER. a. Third Party Transfer. The initial end user of the AUTOMAI Software may make a one-time transfer of the AUTOMAI Software to another end user. Any transfer will include all component parts, media, User Documentation, this EULA, and if applicable, the Certificate of Authenticity. The transfer may not be an indirect transfer, such as a consignment. Prior to the transfer, the end user receiving the transferred Software will agree

to this EULA. Upon transfer of the AUTOMAI Software, your license is automatically terminated. b. Restrictions. You may not rent, lease or lend the AUTOMAI Software or Use the AUTOMAI Software for commercial timesharing or bureau use. You may not sublicense, assign or otherwise transfer the AUTOMAI Software except as expressly provided in this EULA.

5. PROPRIETARY RIGHTS. All ownership and intellectual property rights in the Software and User Documentation are owned by AUTOMAI and/or its suppliers and are protected by law, including applicable copyright, trade secret, patent, and trademark laws. You will not remove any product identification, copyright notice, or proprietary restriction from the Software.

6. LIMITATION ON REVERSE ENGINEERING. You may not reverse engineer, decompile, or disassemble the Automai Software, except and only to the extent that the right to do so is allowed under applicable law.

7. CONSENT TO USE OF DATA. Automai and its affiliates may collect and use technical information you provide in relation to (i) your Use of the Software or the AUTOMAI Product, or (ii) the provision of support services related to the Software or the AUTOMAI Product. All such information will be subject to AUTOMAI's privacy policy. AUTOMAI will not use such information in a form that personally identifies you except to the extent necessary to enhance your Use or provide support services.

8. LIMITATION OF LIABILITY. Under no circumstances shall AUTOMAI or its suppliers or resellers be liable to licensee or any other person for any special, incidental, indirect, or consequential damages, including damages for loss of goodwill, lost profits, work stoppage, business interruption, personal injury, computer failure, loss of privacy, or any and all commercial damages or losses, even if AUTOMAI or any supplier has been advised of the possibility of such damages. Further, in no event shall AUTOMAI's liability under any provision of this agreement exceed the license fee paid to AUTOMAI. Some states or other jurisdictions do not allow the exclusion or limitation of incidental or consequential damages, so the above limitation or exclusion may not apply to you.

9. U.S. GOVERNMENT RESTRICTED RIGHTS AND COMPLIANCE WITH EXPORT LAWS. This software is provided with RESTRICTED RIGHTS. Use, duplication, or disclosure by the Government is subject to restrictions as set forth in subparagraph (c)(1)(ii) of The Rights in Technical Data and Computer Software clause of DFARS 252.227-7013 or subparagraphs (c)(i) and (2) of the Commercial Computer Software-Restricted Rights at 48 CFR 52.227-19, as applicable. You will comply with all laws, rules, and regulations (i) applicable to the export or import of the Software, or (ii) restricting the Use of the Software.

10. RESERVATION OF RIGHTS. Automai and its suppliers reserve all rights not expressly granted to you in this EULA.

Getting help and support

Free POC!

Need a Proof of Concept? Our experts will help establish Automai RPA's viability so that your organization, from stakeholders down to data entry clerks, is 100% behind your decision to go forward with Automai RPA!

Support Team

If at any point during your trial you need more help, our technicians are waiting to help you! Don't hesitate to call our experts at +1 833-288-6624 (+1 833-AUTOMAI) or email Automai Support *support@automai.com/ help@automai.com.*

Online Help

If you can't find what you need in the documentation, you can ask questions, search for answers, exchange comments and suggestions on our Help Center, find answers to your Frequently Asked Questions and watch Training Videos.

Help Center

For one-on-one help, create a support request at Automai Help Center. A support engineer will follow up with you quickly. When submitting your support request, please provide as much detail as possible. This will help us resolve your issue faster.

Send us feedback

We love to hear your thoughts on Automai RPA and your ideas for future features and improvements. Also, occasionally bugs do happen. If you find one, we'll do our best to fix it.

Go to Automai Help Center and submit your problems, questions and suggestions about the product. Let us know what you think!