



A2019 Salesforce Report Extractor Bot

Readme

Version 1.0
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1. Introduction

This document contains all essential information for the user to make full use of this A2019 Bot. It includes a description of the functions and capabilities and step-by-step procedures for setup & configuration of the Bot.

1.1 Overview

The Salesforce Report Extractor Bot can be called from any A2019 bot and downloads the specified report from Salesforce and emails that report to a designated recipient. This bot includes a sample code bot that invokes the Report Extractor Bot.

1.2 Use cases

The key use case for this bot is to retrieve an Excel version of the specified Salesforce report and email it to a recipient or distribution list.

2. Requirements & Prerequisites

2.1 System Requirements

Below are the minimum system requirements for running bots as an Enterprise A2019 (Cloud deployed) or Community Edition user on your local machine.

Hardware Requirements

Device	Processor	RAM	Storage (Free Space)	Network
Machine	Intel Core i5 2.6 GHz	4 GB minimum 8 GB recommended	32 GB	1 GbE
Bot Creator and Bot Runner	No additions to the machine requirements	No additions to the machine requirements	Add 100 through 150 KB per Automation Anywhere script Add 40 through 50 GB per long-term project	No additions to the machine requirements

Browser Requirements

The user interface for Automation Anywhere Enterprise is through a browser. Login to your device then login to Enterprise Control Room through a browser.

Browser	Browser Version	Automation Anywhere plug-in version ²	Supported bot functions by Bot agent version		
			2.0.2	1.0.2	1.0.1
Google Chrome ¹	57 or later	11 or 12	2.0.2	1.0.2	1.0.1
Microsoft Internet Explorer	11	N/A	None	Debugger only	All except Credential Vault

(1) Google Chrome re-verification

CAUTION: Google Chrome requires re-verification of permissions when the Automation Anywhere Google Chrome extension (Version 11.3.3 or later) is updated. If prompted, click **Enable this item** in the Google Chrome message. Alternatively, re-enable the extension through [chrome web store](#). Similarly, if you are deploying your Bot Runners from a master image, accept the permission from within that image.

(2) Google Chrome plug-in versions

A2019 supports Chrome plug-in version 11. If you have other versions installed, you might not be able to record tasks using the **Record** feature or **Capture** action. To resolve this issue, do the following:

1. Rename the automation.chrome.agent registry key to automation.chrome.agent.old. The registry key is available at: Computer\HKEY_CURRENT_USER\Software\Google\Chrome\NativeMessagingHosts
2. Disable all other Google Chrome plug-in versions you have installed, except for version 11.

2.2 Prerequisites

This bot uses A2019 and the Microsoft Outlook application to send the extracted report to the intended recipient. The following are required:

- A Salesforce Lightning account and login
- Access to export reports
- Microsoft Outlook installed on the bot runner machine
- Access to a local folder in order to temporarily write the downloaded report
- Chrome browser on bot runner machine

3. Getting Started

3.1 Quick Start

3.1.1 Setup

3.1.1.1 Outlook

Outlook should be installed and configured to be able to send email on the bot runner machine in order to have the downloaded report emailed to the recipient.

3.1.1.2 Salesforce Login

The bot which invokes the A2019 Salesforce Report Extractor Bot must have already logged into Salesforce so that the Extractor Bot may open a window directly to the Salesforce Reports page.

3.1.1.3 Chrome Browser

This bot operates with the Chrome browser. This must be installed on the bot runner machine and the Salesforce Login specified above must happen in the Chrome browser for the report extraction to work properly.

3.1.2 Configuration

Review and setup the variables happen in the calling bot. The sample calling bot included is called “Get Sample SFDC Report” bot. It contains an example to invoke the SFDC Report Extractor Bot. There are three required and one optional input values, and no output values.

INPUT VARIABLES: Input Variables to be mentioned in this Table				
Variable Name	Type	Mandatory	Purpose	Example Input
in_SFDCreportURL	String	Yes	Specifies the URL for the SFDC report	“https://aainc.lightning.force.com/lightning/r/Report/0006UA1/view?queryScope=userFolders”
in_DownloadsDirectoryPath	String	Yes	Path where Chrome writes your downloads	“C:\Downloads\”
in_DestinationEmail	String	Yes	Email address to send report	“joe@email.com”

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 [Enterprise A2019](#).

4.2 FAQs

Q: Can I make changes to this bot?

A: Absolutely. Free 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.

Q: How can I change the output format of the bot?

A: When calling a subtask, the return value is always of type dictionary, and the value(s) returned from the subtask can be access through their specific variable names as a key within the dictionary.

For questions relating to Enterprise A2019: See the [Enterprise A2019 FAQs](#).

Appendix A: Record of Changes

No.	Version Number	Date of Change	Author	Notes
1	1.0.0.0	3/1/2020	Max Mancini	Initial release of Bot

Appendix B: References

No.	Topic	Reference Link
1	Overview of Enterprise A2019	Click here
2	Guidance: Building basic A2019 bots	Click here
3	Guidance: Building A2019 action packages	Click here
4	APeople Community Forum	Click here
5	Automation Anywhere University	Click here