



Possibilities **Unlimited**

AssistEdge Community Edition 20.1

EVA Bot User Guide



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AE-EVA BOT-USER GUIDE

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1 Introduction




In this digital age, where unprecedented changes continue to take place, it is imperative for enterprises to begin their automation journey now. The first step in it is Robotic Process Automation (RPA), which means automating a business process in part or end-to-end. RPA has the capability to interpret and emulate existing manual processes which can improve operational efficiency and ensure a lean organization. It can be implemented across sectors including finance services, healthcare, insurance, telecom and customer services.

1.1 Audience

This User Guide is intended for end-users, offering an overview and detailed instructions for operating AssistEdge EVA Bot.

1.1.1 Document Conventions

The notational conventions used in this guide are explained below.

Icon	Description
	Important
	Note
	Process taking place in AssistEdge Studio

1.2 Naming Conventions

Convention	Meaning
Admin	Administrator
AE	AssistEdge
RPA	Robotic Process Automation

2 About AssistEdge RPA

AssistEdge RPA is among the suite of business applications offered by EdgeVerve. AssistEdge actively works with some of the world's largest companies to automate their business processes end-to-end and help achieve enhanced productivity, reduced operational costs and minimized errors.



Figure 1: AssistEdge Success Stories

The AssistEdge RPA platform enables users to build, deploy and manage intelligent bots or a digital workforce that automates processes end-to-end across heterogeneous applications. Key applications that can be automated using AssistEdge RPA are:

- COTS (commercial off-the-shelf) products such as SAP, Siebel (Open UI, HI), Oracle EBS, PeopleSoft and Salesforce.
- Legacy applications such as Mainframe. PDF and image-based automation.
- Standard application like Windows thick-client, Java, web-based applications, email, SharePoint and more.

The benefits of automating with AssistEdge RPA platform include:

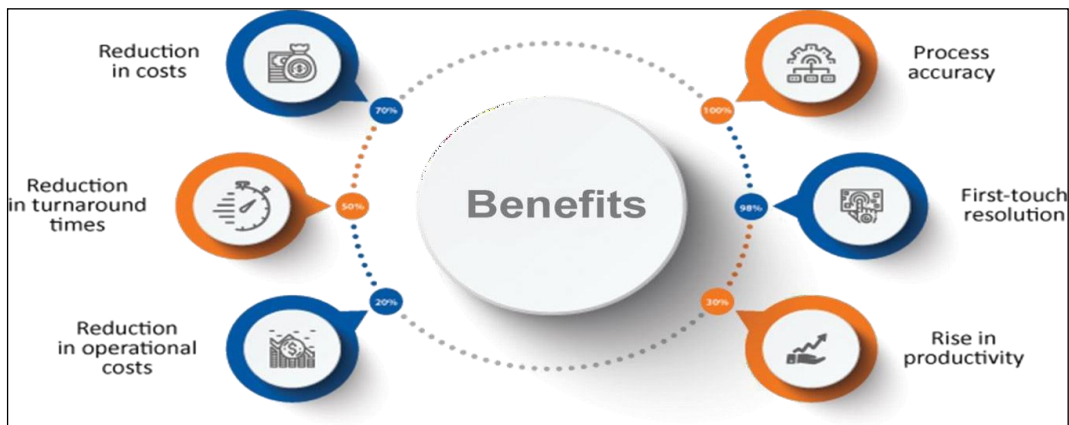


Figure 2: Key benefits of AssistEdge

While the core product AssistEdge RPA is intended for enterprise users, the AssistEdge RPA Community Edition is a leaner version with powerful automation capabilities and easy-to-use interface. The feature-rich AssistEdge Automation Studio and the AssistEdge EVA Bot are bundled in the Community Edition to offer programmers, students, academic researchers and RPA enthusiasts a hands-on experience with RPA and enable them to implement personalized automation. The AssistEdge Automation Studio enables the creation and deployment of processes, while the AssistEdge EVA Bot enables execution of these processes.

2.1 About AssistEdge EVA Bot

AssistEdge EVA Bot enables the automation of repetitive tasks for personalized automation. Automation processes configured and deployed in AssistEdge Studio are executed by AssistEdge EVA Bot. AssistEdge EVA Bot performs four key functions:



Process Execution: Deployed processes created in AssistEdge Studio.



Trigger Setup: Setting triggers (time, file and email) to activate processes.



View Execution History: Monitoring the status of processes being execute.



View Dashboard: View usage of Community Edition.

3 Get Started

The following software and hardware requirements are pre-requisites to installing and working with the AssistEdgeEVA Bot.



The AssistEdge EVA Bot executes processes created in AssistEdge Automation Studio and are in the 'Deployed' state.

3.1 Hardware Set-up

Name	Details
Minimum	2 Core CPU, 4GB RAM
Recommended	2 Core CPU, 8GB RAM

3.2 Software Set-up

Name	Details
Operating System	Microsoft Windows 7 or above
.Net Framework	4.6 or above
License	A valid license for using AssistEdge Community Edition



Ensure the installer executable file is not blocked by antivirus software.

3.3 Launch AssistEdge EVA Bot

The AssistEdge EVA Bot creates an icon in the system tray. Right-click the icon and choose “EVA Bot” from the submenu to launch AssistEdge EVA Bot.

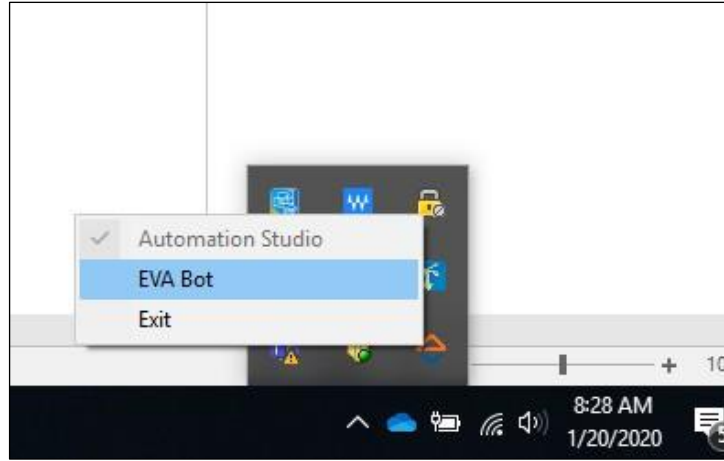


Figure 5: AssistEdge EVA Bot launch icon in system tray

On selecting “EVA Bot” from the sub-menu, the user interface appears on the lower right corner of the screen.

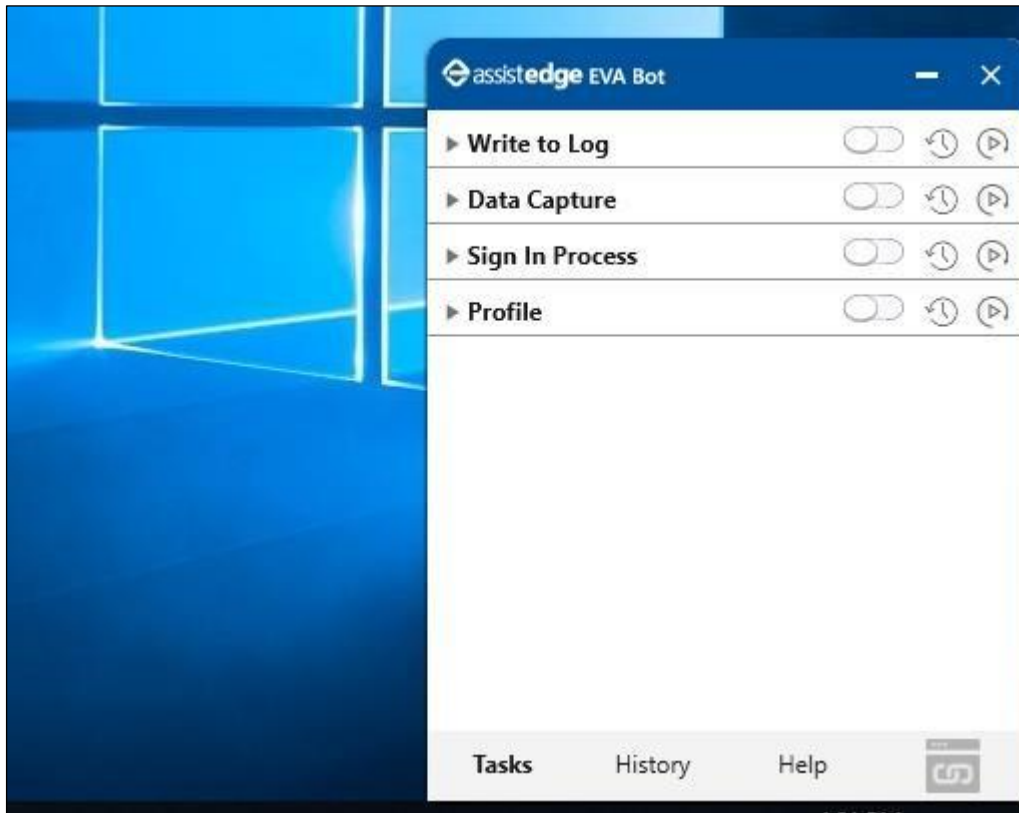


Figure 6: Desktop view on AssistEdge EVA Bot launch



AssistEdge EVA Bot is usable only after creation and deployment of the process in AssistEdge Studio. AssistEdge EVA Bot has to be started (or re-started if it is already running) to get the new process or process updates. The following message is displayed on process deployment completion in Automation Studio: *"Process 'Name' deployed successfully. Close and open the EVA Bot to get the deployed process."*

4 Process Workflow

It is important to understand the process workflow of AssistEdge RPA Community Edition execution. This flowchart summarizes the flow after a process is created, tested and deployed in AssistEdge Studio and as executed using AssistEdge EVA Bot.

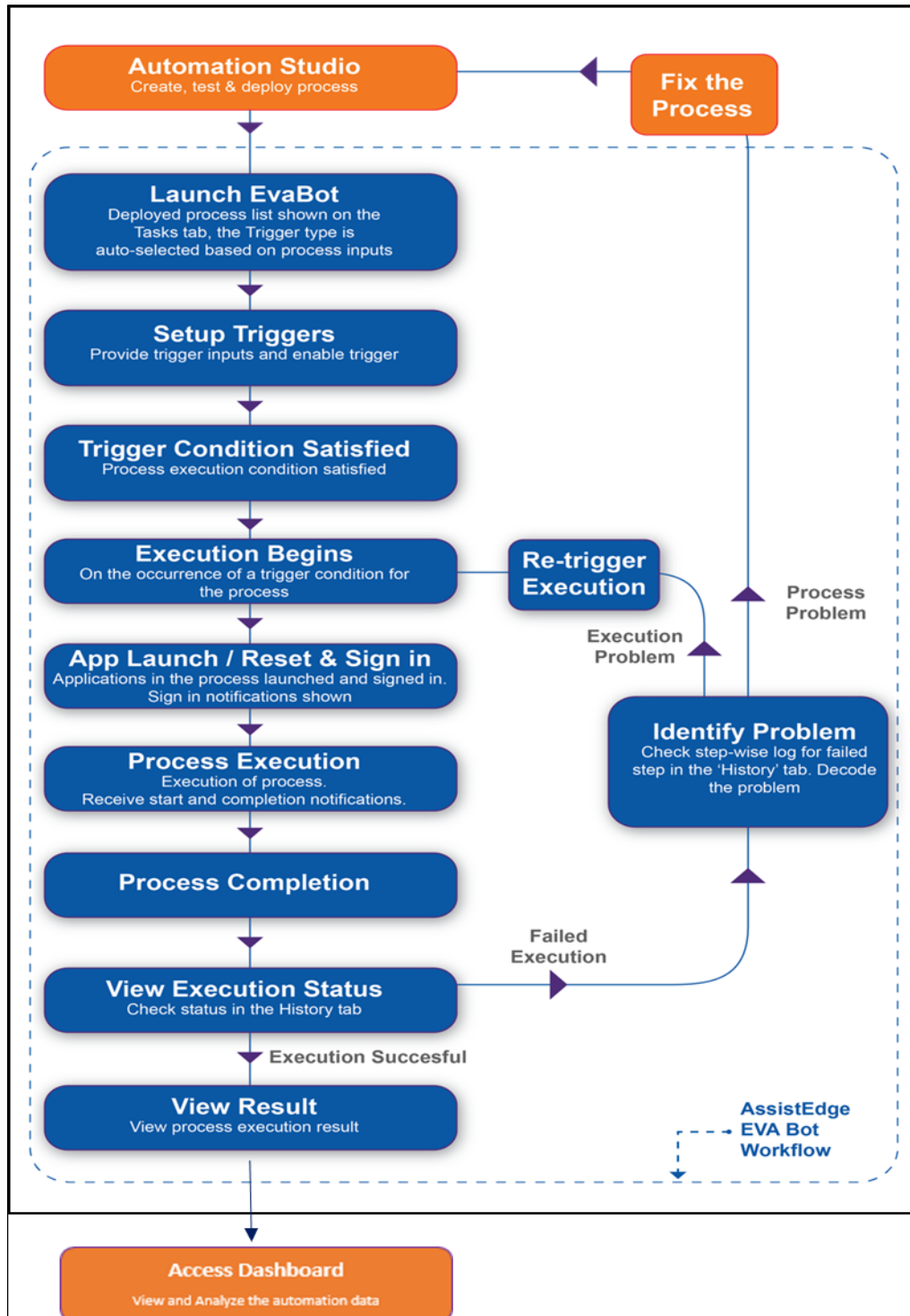


Figure 7: Overall process workflow of AssistEdge RPA Community Edition (AssistEdge Studio + AssistEdge EVA Bot)

5 AssistEdge EVA Bot User Interface

AssistEdge EVA Bot's features are available in three key tabs.

- [Task Tab](#)
- [History Tab](#)
- [Help Tab](#)

5.1 Tasks Tab

The Tasks tab lists all the processes created and deployed in AssistEdge Studio. Hover over the elements in the Tasks tab to know more about their function. The user controls displayed next to the listed tasks are described here.

- **Task Name** – A process deployed in Automation Studio is shown in the Tasks tab as a task. Click arrow that appears next to the task name to setup the triggers for task execution.

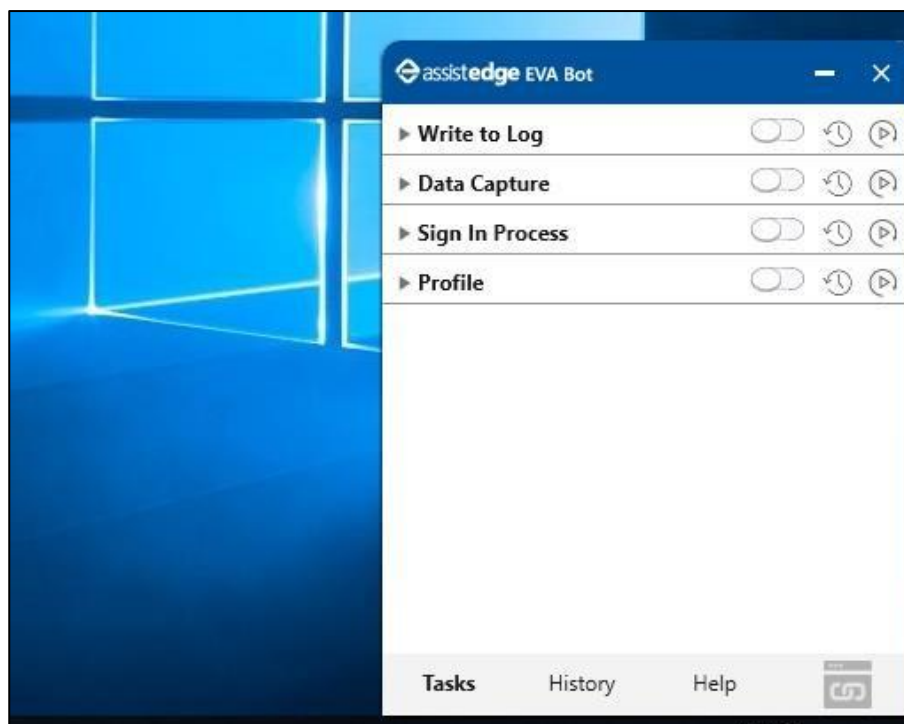


Figure 8. Deployed process list in the Tasks tab

- **Enable/Disable Trigger**– A toggle button helps turn on/off triggers that are setup for process execution. For detailed information on setting up triggers, refer [Trigger Settings](#).

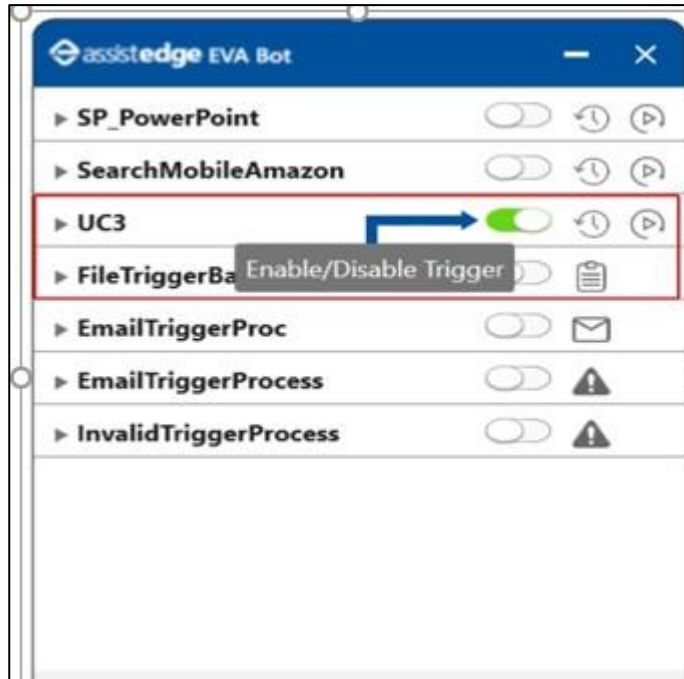


Figure 9: Toggle button to enable/disable a process trigger

- **Trigger Type** – This icon represents the trigger type that is auto-selected by AssistEdge EVA Bot i.e. Email Based, File Based and Time Based.

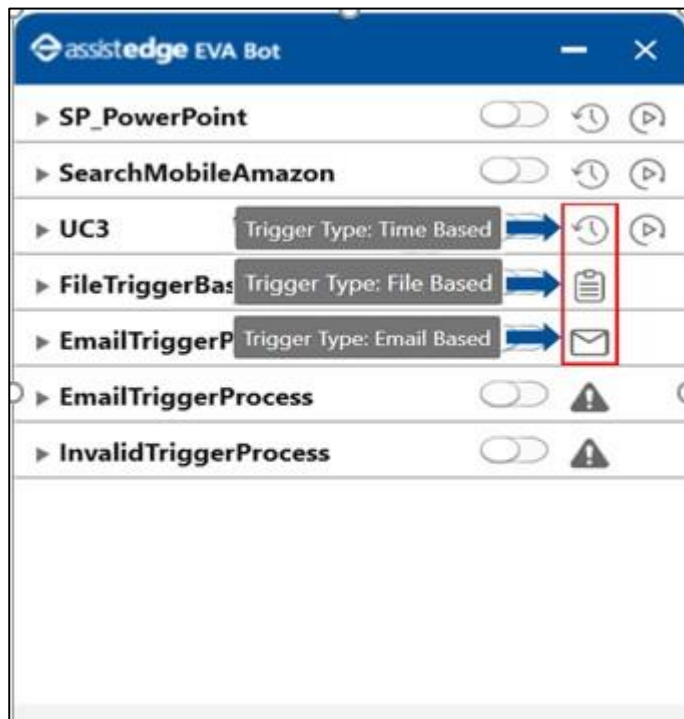


Figure 10: Trigger Types – Time Based, File Based and Email Based

- **Run Now** – This button executes a time-triggered process instantly.



Figure 11: Run Now button with Time Based triggers



The 'Run Now' button appears only for 'Time Based' trigger type. ⚠

If the process is setup such that, the input of the process does not match the input as required by the supported trigger types, an error appears next to the Enable/Disable button. Hovering on the error sign lists the possible reasons for the error and guidance on how it can be rectified.

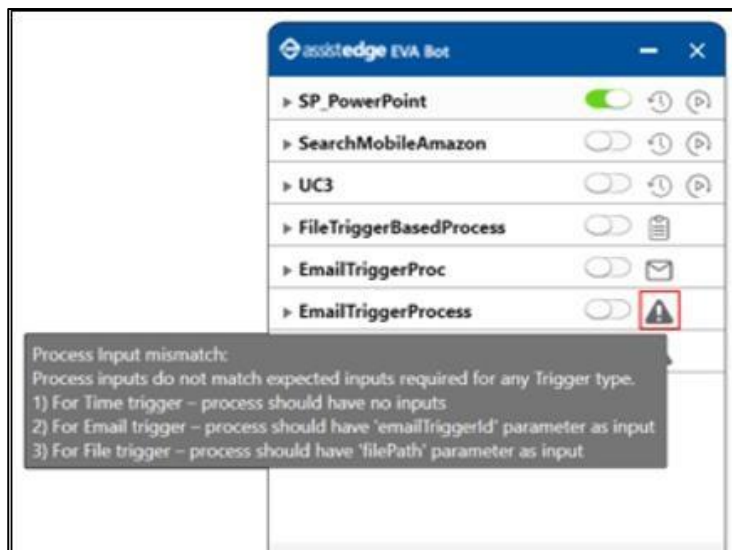


Figure 12: Indicates a failed process; displays reasons for failure

5.2 History Tab

The History tab is an archive of all the tasks executed by AssistEdge EVA Bot. These are organized chronologically under the following three categories:

- Today
- Yesterday
- Last Week

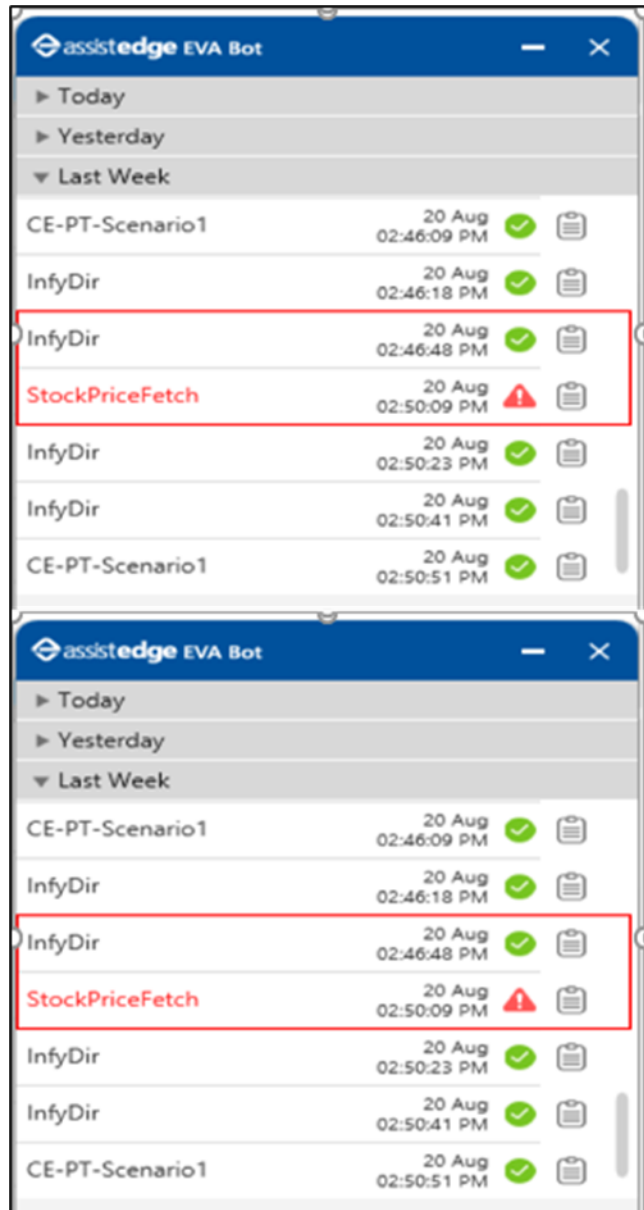
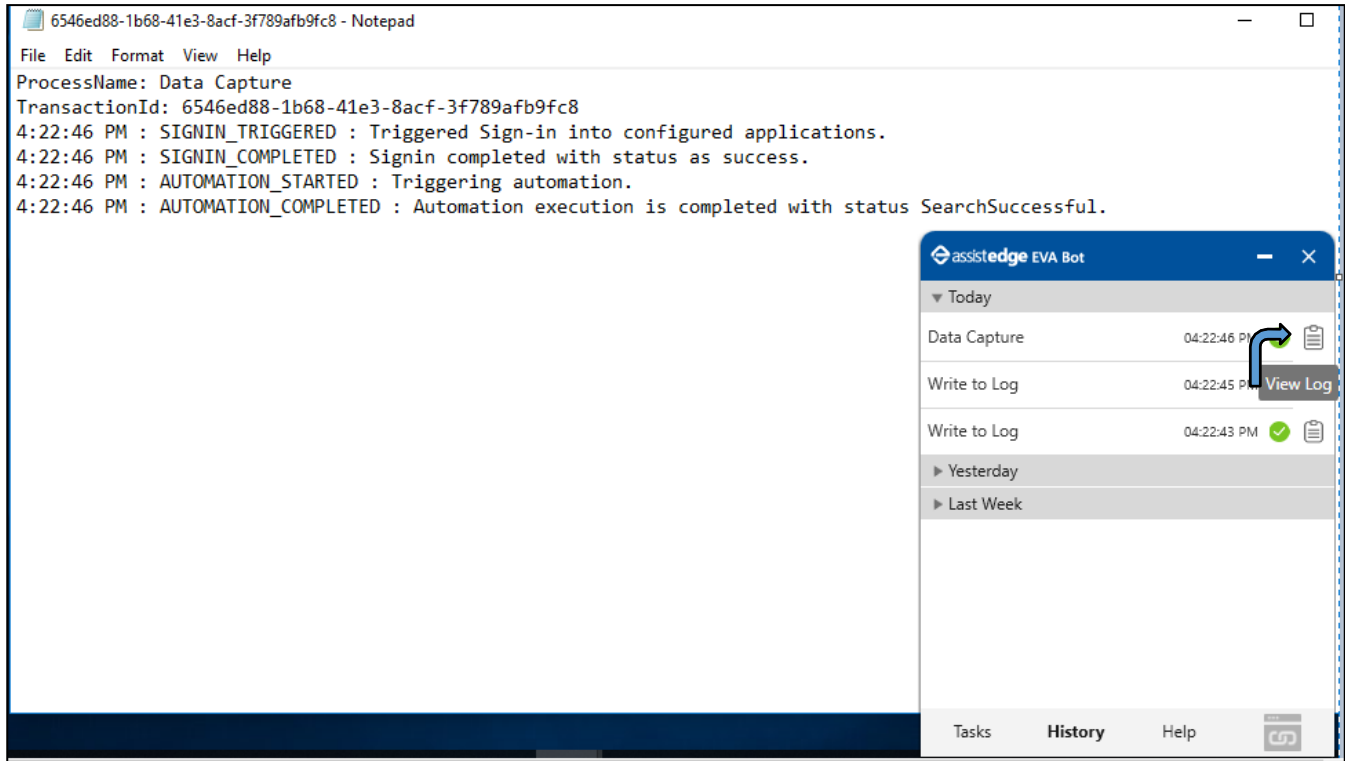


Figure 13: Green icon indicates successful process execution; red indicates process failure

The History tab lists every transaction carried out along with the corresponding date, execution status and step-by-step log file. This is helpful for identifying and debugging failures.



The Help tab offers two key features:

- **About:** This button displays the product version information.
- **View Logs:** This button opens the EVA Bot log file. In addition to the process execution log shown for each process run in the 'History' tab, this file helps debug and get more insights into the root cause of errors, if any.

5.3 Help Tab

The Help tab offers all the online guidance necessary to use AssistEdge EVA Bot. It provides links to a detailed video tutorial and a user guide, and also includes general information about AssistEdge EVA Bot.

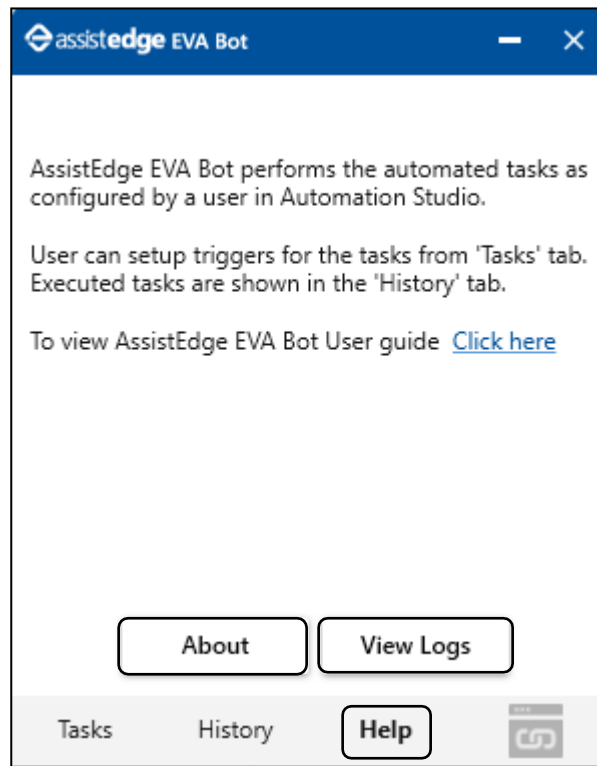


Figure 15: Help Tab offers general information and more insights into debugging failures

5.4 Reporting


Reporting button enables to go to the [AssistEdge Community Edition Dashboard](#).

6 How AssistEdge EVA Bot Works

The AssistEdge EVA Bot executes processes created in AssistEdge Studio and also serves as a platform for users to view execution details and identify problems, if any.

6.1 Process Execution

When a process is created and deployed in AssistEdge Studio, it appears in the Tasks tab of AssistEdge EVA Bot, alongside an Enable/Disable button and an icon representing the trigger type.



If the Tasks tab is empty, this means that no process has been deployed yet.

This trigger type is auto identified by the EVA Bot, which can be 'Email Based', 'File Based' or 'Time Based', depending on the parameters provided in process inputs, while creating the process in AssistEdge Studio.

6.1.1 Trigger Settings

Once the process appears in the Tasks tab, click the arrow next to the process name to configure the trigger to begin the process execution.

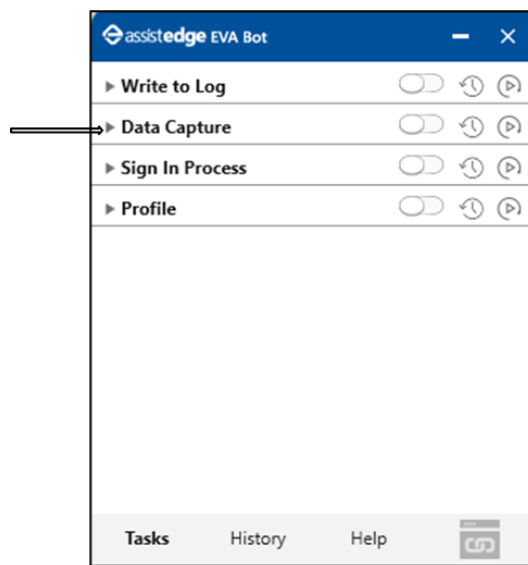



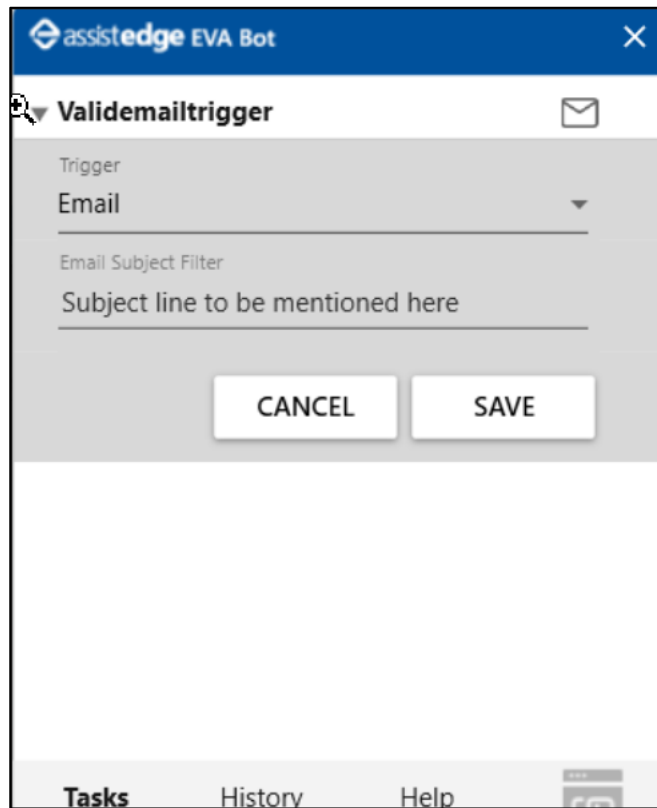
Figure 16: Trigger Configuration

Email Trigger

The task is triggered only on receipt of an email with a pre-defined subject in the Outlook email client.



Microsoft Office Outlook must be open on the user machine on which the Bot is executing the process.



Input Required	How a Process is Triggered/ Process TriggerActivation?
<p>The user provides content in the 'Email Subject' line for Outlook monitoring. A search is performed based on the 'subject line'. The subject content should be as precise as possible so that the task is triggered only for intended e-mails.</p> <p>'Email Subject' line can be empty, for tasks to be executed for every incoming mail.</p>	<p>The process is triggered for execution by the Bot as soon as a new email is received and the 'subject line' of a new email matches the 'subject line' specified in the trigger and when the triggered is enabled.</p>



Once the user has selected “Email Trigger” as the Process Trigger Type, the FieldName and DisplayName are automatically updated with emailTriggerId.

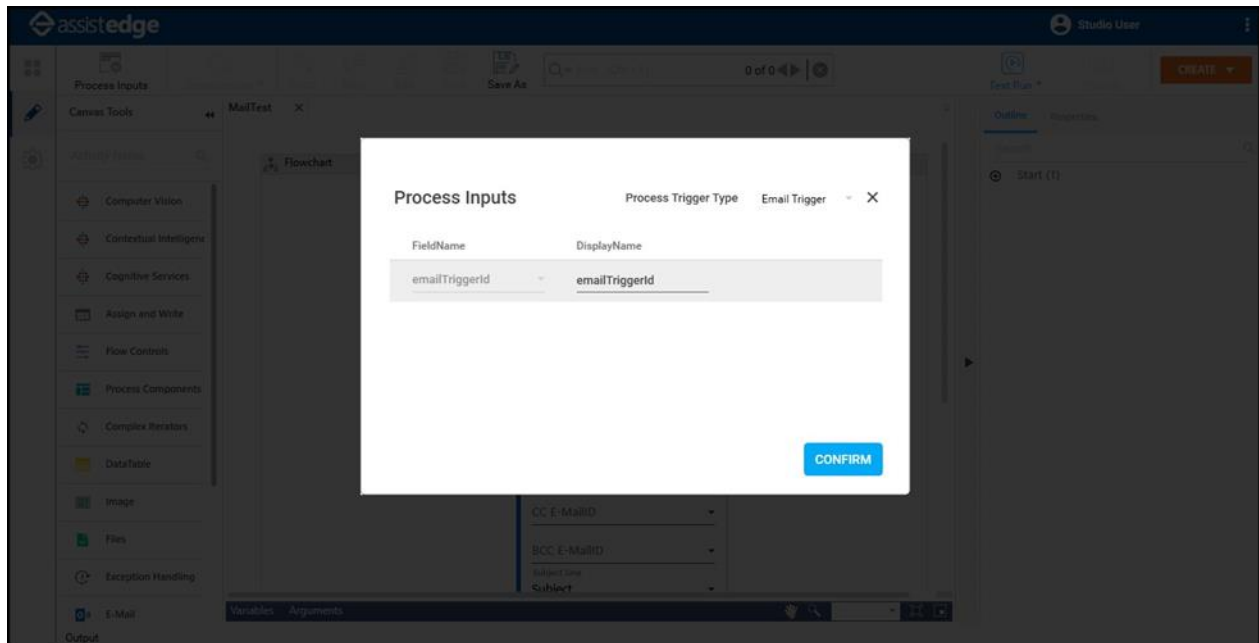


Figure 17: Process Inputs for Email Based trigger assigned in AssistEdge Studio

File Trigger

The process is triggered on receiving a file in the specified folder.

Input Required	How a Process is Triggered/Process Trigger Activation?
<p>Folder Path: Path of the folder where the file is placed. For e.g.: D:\CommunityVersion\TestData\ Filename Regex: The name of the file for which a process is to be triggered. A filename can be set up as a regular expression. This way it becomes possible to pass multiple files having same prefix. For e.g.: If the file name is abc_file*.xlsx. Then, when a file starting with name "abc_file" and having an extension as "xlsx" is added into the folder being monitored, the process is triggered.</p>	<p>The process is triggered for execution each time a new file with the specific filename is received in specified folder.</p>

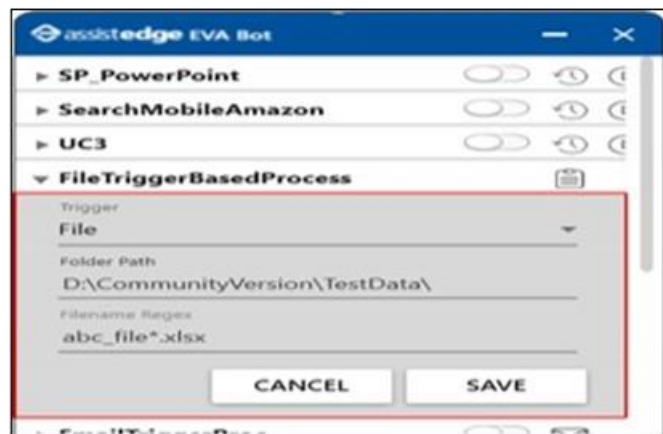


Figure 18: Trigger Configuration – File Based



Once the user has selected "File Trigger" as the Process Trigger Type, the FieldName and DisplayName are automatically updated with filePath.

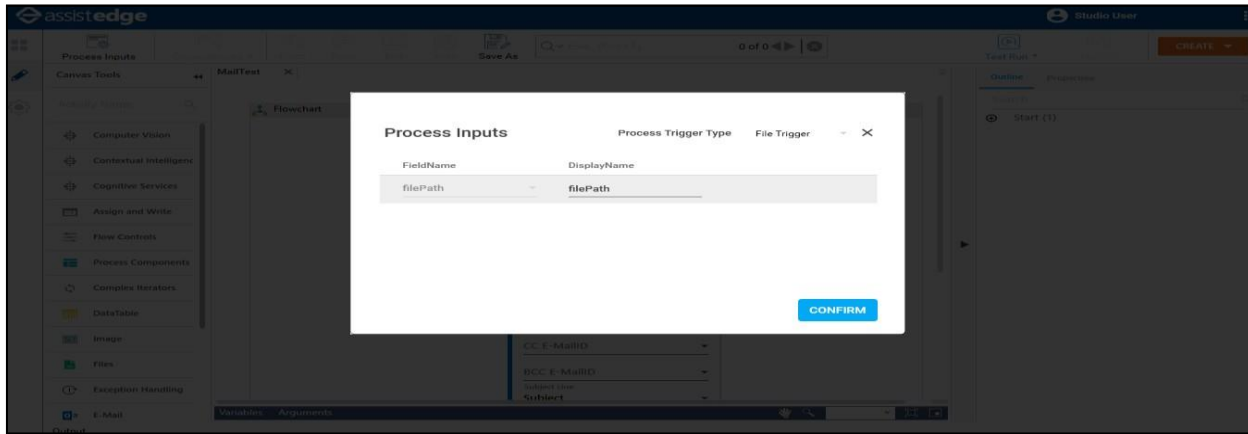


Figure 19: Process inputs for File Based Trigger assigned in AssistEdge Studio

Time Trigger

The task is triggered only at a scheduled time or at a specific frequency.

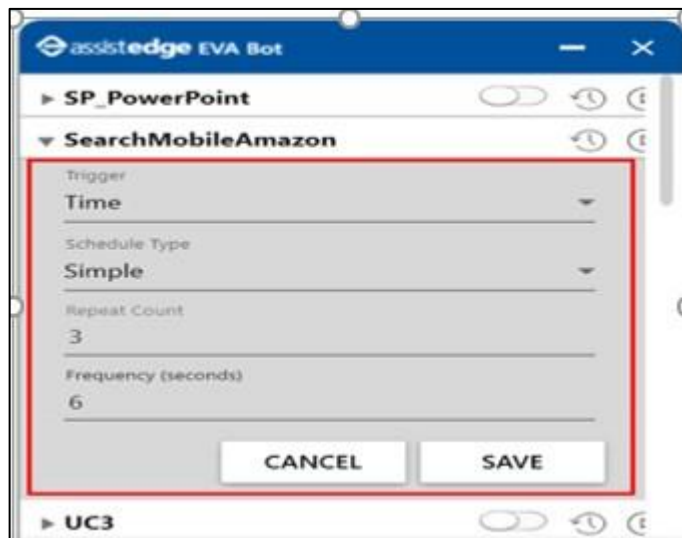


Figure 20: Trigger Configuration - Time Based

Click **Run Now** to instantly start a time triggered process. refer [AssistEdge EVA Bot User Interface](#) for more information on the Run Now button.

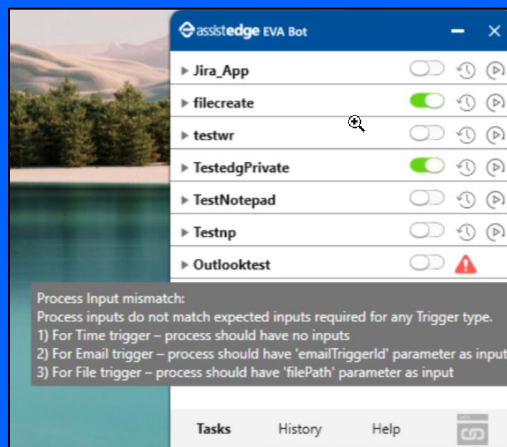
Schedule Types	Input Required	How a Process is Triggered/ Process Trigger Activation?
Simple	<p>Repeat Count – A value that decides the number of times the process should be repeated after the first run.</p> <p>Frequency – A value that decides the time interval in seconds between process repetitions.</p>	<p>Process execution takes place as soon as the trigger is enabled.</p> <p>Depending upon the frequency, subsequent executions take place.</p>



For Simple Time Based trigger, the first execution takes place as soon as the trigger is enabled. The next executions take place according to the time interval and frequency.

Time trigger doesn't require any input parameters set in the 'Process Inputs' section during configuration.

Note: If you try to migrate and deploy process(es) with custom triggers/applications from AE RPA Enterprise Edition to AE Community Edition, then following error appears in EVA Bot and you will not be able to execute the process.



6.2 View Execution History

When a process is being executed, AssistEdge EVA Bot indicates the activity with notifications at the start and end of the process. Besides, the ongoing process execution is indicated by the continuous blinking of that specific process in the Tasks tab.

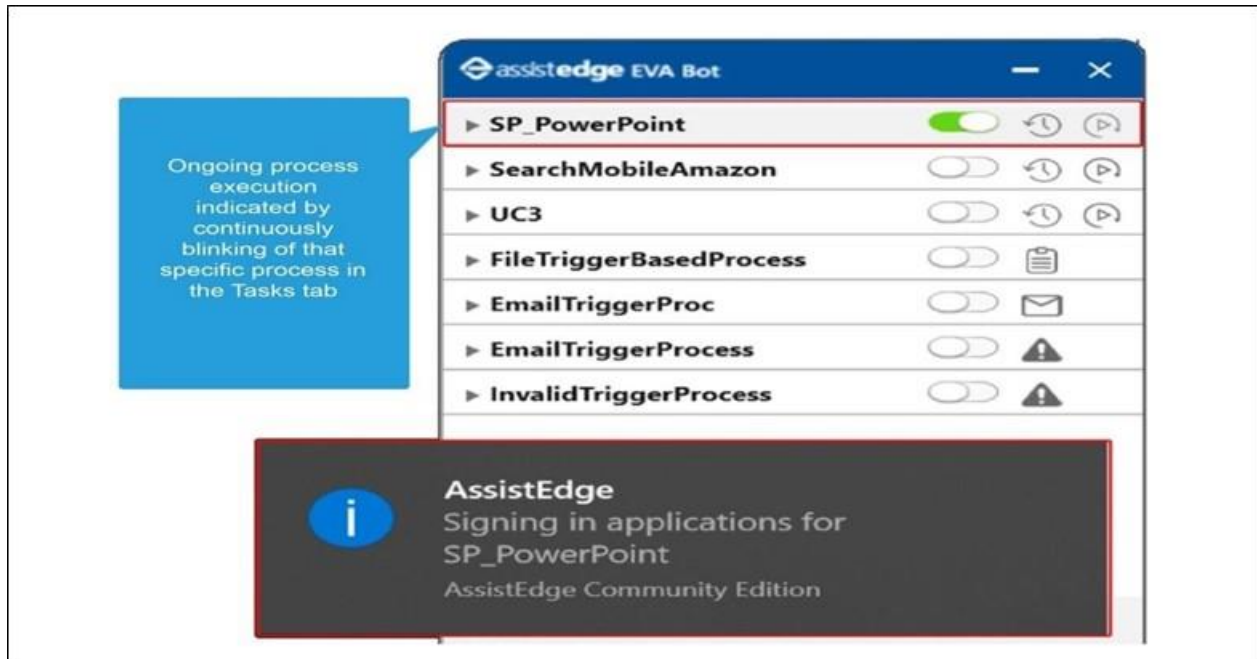


Figure 21: Process execution indicators

The History tab is an archive of all the processes executed in the current day i.e. 'Today', the day before as shown in 'Yesterday' and the week before i.e. 'Last Week'. For every process run in this time, this tab stores all related data including process name, execution time, execution status and step-by-step run log which is viewed from the log file for that run. Failed transactions are also highlighted here. In case of a failed transaction, it is highlighted in red, along with a sign.

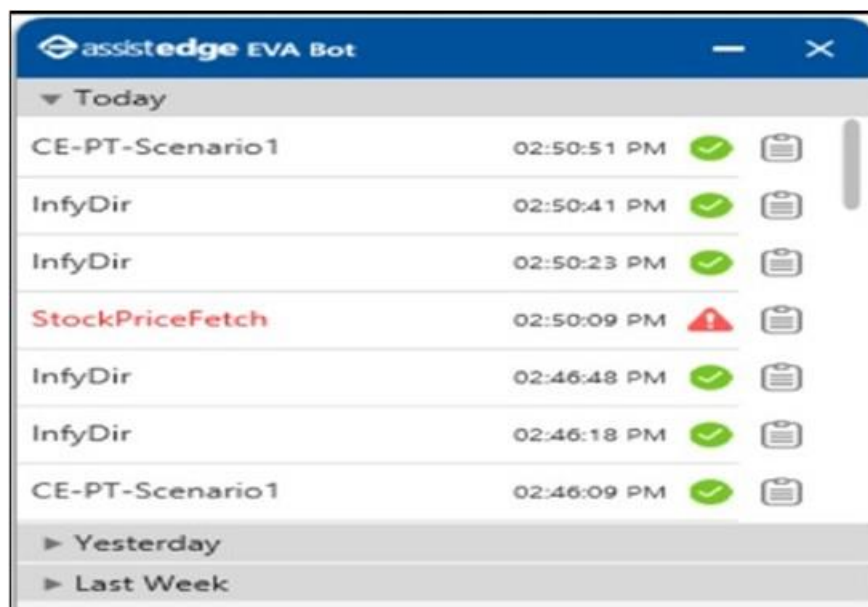
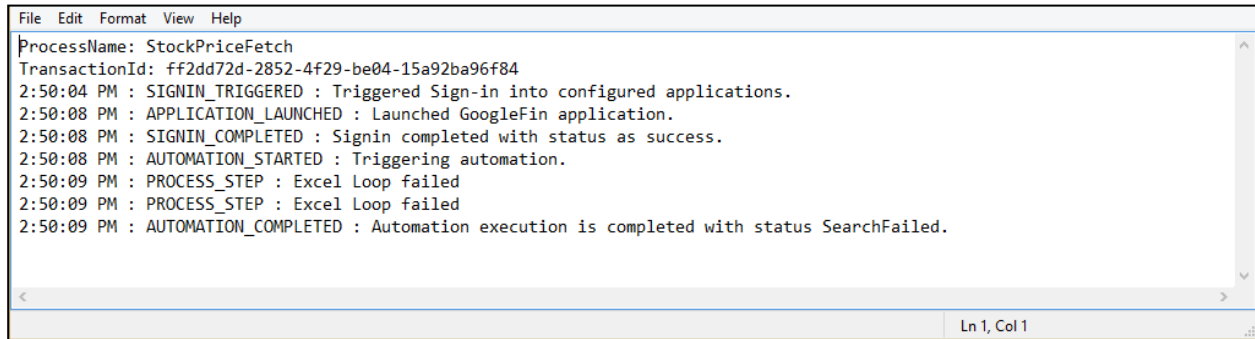


Figure 22: Run log for processes accessible from History tab



```
File Edit Format View Help
ProcessName: StockPriceFetch
TransactionId: ff2dd72d-2852-4f29-be04-15a92ba96f84
2:50:04 PM : SIGNIN_TRIGGERED : Triggered Sign-in into configured applications.
2:50:08 PM : APPLICATION_LAUNCHED : Launched GoogleFin application.
2:50:08 PM : SIGNIN_COMPLETED : Signin completed with status as success.
2:50:08 PM : AUTOMATION_STARTED : Triggering automation.
2:50:09 PM : PROCESS_STEP : Excel Loop failed
2:50:09 PM : PROCESS_STEP : Excel Loop failed
2:50:09 PM : AUTOMATION_COMPLETED : Automation execution is completed with status SearchFailed.
Ln 1, Col 1
```

Figure 23: Step-by-step run log to identify and debug failures

The 'View Log' in the History tab offers a step-by-step run log that helps users identify the steps that have caused the failure. This plays a crucial part in helping to identify the cause of failure and debug issues. To make it further simpler to identify a transaction, the execution log comes with a unique ID. It is possible to look up the transactionID in the View Logs section under the Help tab.

7 Accessing Community Edition Dashboard

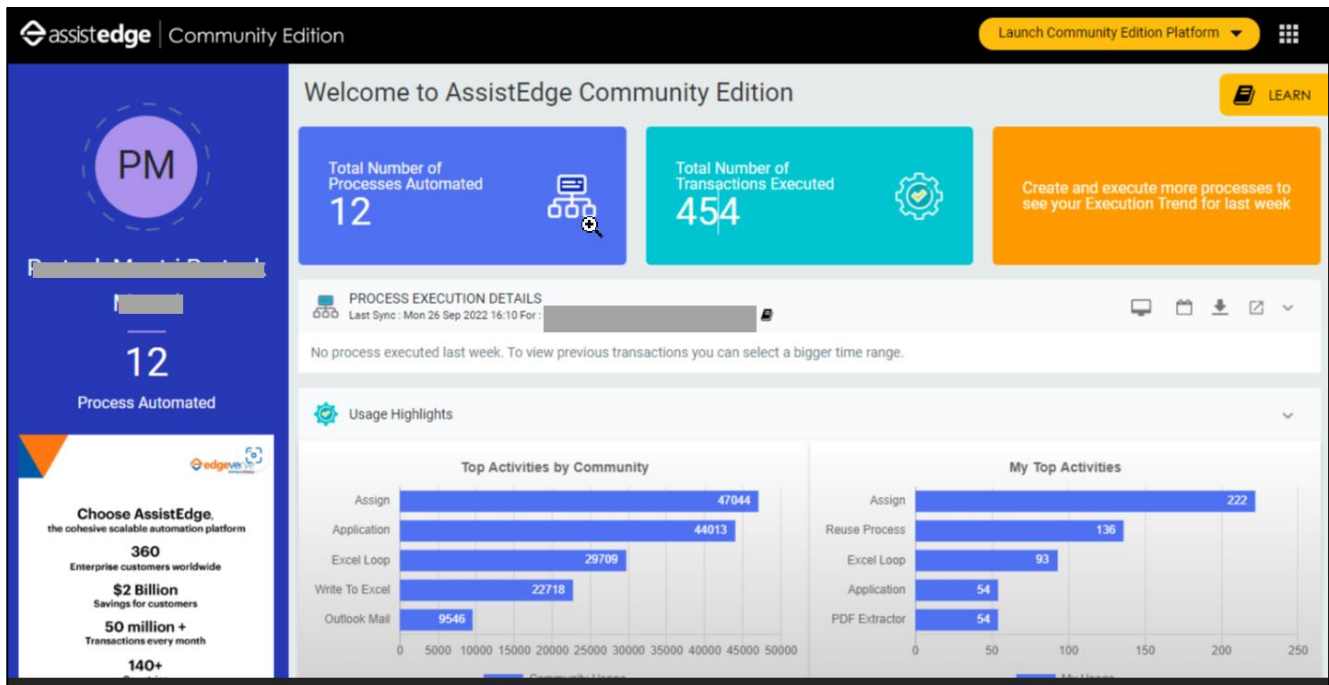
You can access your community dashboard from the Eva Bot window at any time. Dashboard helps let you know and understand your automation processes by means of key indicators of performance, usage and success. The Dashboard automatically evaluates data and displays the aggregated details. This enables you to track your automation processes which can be used for faster, more reliable forecasting.

Additionally, the dashboard includes data to display the usage of Community Edition by the community and helps you compare your usage with the community.




The **AssistEdge Community Edition Dashboard** screen appears. This screen contains the following details:

- [Top Bar](#)
- [Left pane](#)
- [Main dashboard screen](#)



7.1 Top Bar

Top Bar comprises of following information.

- Company Logo
- Product Name
- Launch Community Edition platform options. You can either download the community edition package over new machine or existing machine. Once you select the option, build is downloaded on your system. After the installation, you can start working on the Community edition platform.
- Click the  to view the logged username and also you can logout of the community edition platform.



7.2 Left pane

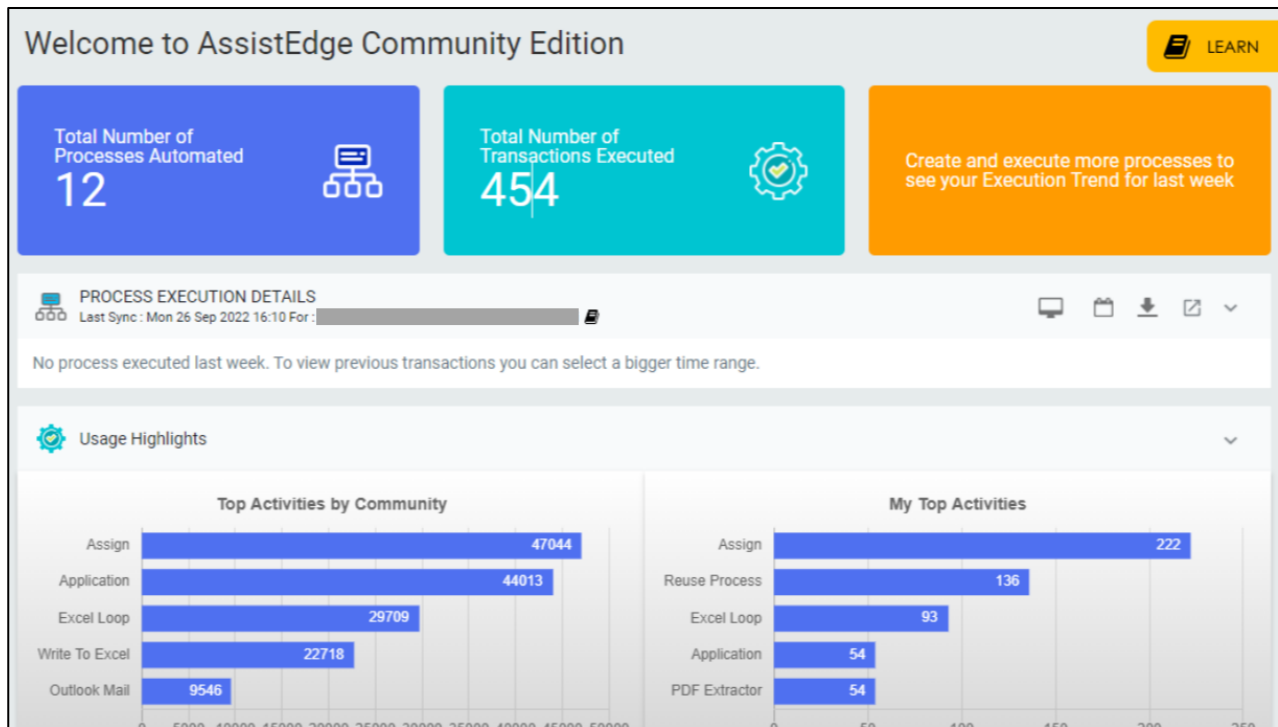
Left pane consist of information such as name of logged in user, number of automated processes. Additionally, if you click the banner image, you will be directed to community edition home screen.



7.3 Main Dashboard screen

The AssistEdge Community Edition Dashboard contains information such as-

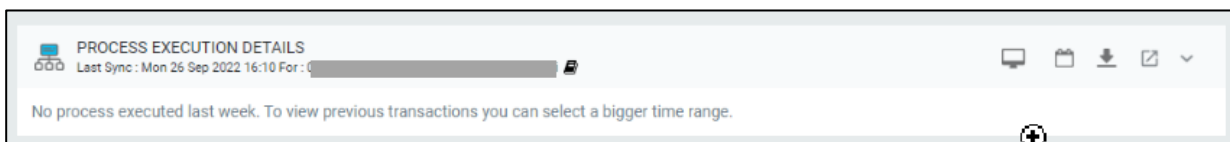
- Click **Learn** to understand more about AssistEdge Community Edition Dashboard.
- Total number of process automated
- Total number of transactions executed



7.3.1 Process Execution

Process execution section enables you to view certain details such as:

- You can view the process execution and machine details
- You can sort the execution details using option such as last week, Last 30 days, and last 180 days.
- You can download the process execution details



7.3.2 Usage Highlights

The Usage highlights shows the graphical reports i.e.,

- Top Activity by Community:** This report shows the total activities of Automation Studio activities used by community to create automation processes. For example, Assign, Excel loop, Application and so on.
- My Top Activities:** This report shows the number of times the top activities in the Automation studio is used by logged in user. For example, Assign, Excel loop, Application and so on.



7.3.3 Market Place

An innovative platform to enable reuse of skills created by experts in specific areas. Share your experience and benefit from other's skills to fast track your automation journey.

7.3.4 Community

An engaging platform for the AssistEdge user's community to discuss AssistEdge product related queries, suggestions, feedback and in general enabling the community users to help each other.

7.3.5 About

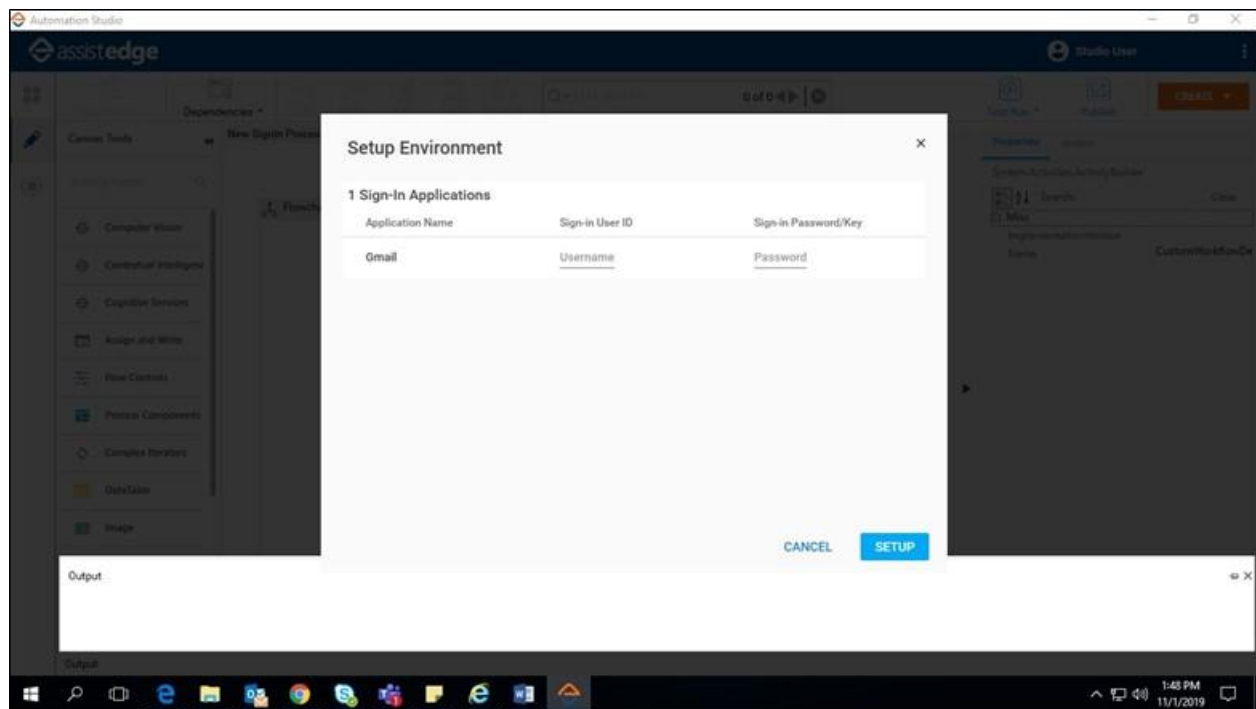
About section provides information about AssistEdge Community Edition.

8 FAQs

Frequently asked questions for AssistEdge EVA Bot are listed below:

Q1: While the process executes in AssistEdge EVA Bot, where do the application 'sign-in' credentials come from or where are they to be provided?

Answer: The sign-in credentials for application that are provided in AssistEdge Studio while testing the process in 'Setup Environment' are used in the EVA Bot. To update the credentials, re-run the automation process in AssistEdge Studio with the updated credentials and re-start the EVA Bot.



Q2: I have deployed a new process, but it is not showing up in the 'Tasks' tab of AssistEdge EVA Bot?

Answer: Restart AssistEdge EVA Bot to get the latest deployed processes and the process changes.

Q3: I have created and deployed a process, but AssistEdge EVA Bot does not allow me to setup triggers and gives an error that reads: "Process input mismatch"?

Answer: For processes to be triggered using Email-Based, Time-Based or File-Based triggers, specific input parameters are expected as specified in the Tasks tab section. If a mismatch is found in the expected parameters and the process inputs, this error is shown. To fix the issue, update the process in AssistEdge Automation Studio to provide relevant inputs, deploy process and setup triggers again.

Q4: I can pass only specific input to the process due to the trigger specifications, but my process requires more input?

Answer: Use an external file to pass more input at the start of the process e.g. using an MS Excel file and configure the process to read the input from the file.

Q5: I have a File-Based trigger configured, file(s) are already present in the folder with the right filename. However, the process does not execute.

Answer: The trigger checks for receipt of a new file in the folder. Since the file is already present in the folder, the trigger does not detect it as a new file. Hence the process is not executed. As a workaround, remove file(s) from the folder and place the file(s) again in the folder.

Q6: I have a File-Based trigger configured. File(s) are already present in the folder with the right file name. I have updated / overwritten / replaced the file with the same file name. However, the process does not execute.

Answer: The trigger checks for receipt of a new file in the folder. Since the file is already present in the folder, the trigger does not detect it as a new file. Hence process is not executed. As a workaround, remove file(s) from the folder and place the updated file(s) again in the folder.

Q7: There is a mention that AssistEdge supports out of box configuration of automation of ERP systems like SAP, Siebel, Oracle EBS, Mainframes etc. however I am unable to find the way in which it can be done.

Answer: The automation of the above mentioned technologies is supported in the AssistEdge RPA Enterprise edition. To get the same, you can go for the enterprise edition.

9 License Terms and Conditions

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10 Support

The Help tab in AssistEdge EVA Bot includes general information about AssistEdge Community Edition, along with a tutorial video and user guide link that includes some frequently asked questions. For any other queries log in to the community portal

About EdgeVerve

EdgeVerve Systems Limited, a wholly owned subsidiary of Infosys, is a global leader in developing digital platforms, assisting clients to unlock unlimited possibilities in their digital transformation journey. Our purpose is to inspire enterprises with the power of digital platforms, thereby enabling our clients to innovate on business models, drive game-changing efficiency and amplify human potential. Our platforms portfolio across Automation (AssistEdge), Document AI (XtractEdge), and Supply Chain (TradeEdge) helps inspire global enterprises to discover & automate processes, digitize & structure unstructured data and unlock the power of the network by integrating value chain partners. EdgeVerve, with a deep-rooted entrepreneurial culture, our innovations are helping global corporations across financial services, insurance, retail, consumer & packaged goods, life sciences, manufacturing telecom and utilities, and more. EdgeVerve. Possibilities Unlimited.

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