Worksoft RPA Orchestrator Installation Guide

Worksoft RPA Orchestrator Installation Guide

Version 14.1

Trademarks

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Chapter 1   Preparing Your System for Worksoft RPA Orchestrator

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In This Chapter

Overview

Worksoft RPA Orchestrator allows organizations to automate repeated tasks and complex processes across multiple enterprise applications and systems in a seamless and code-less way.

Administrators create digital workers that work alongside employees to accomplish repeated tasks and processes so that employees can focus on value added tasks.

Worksoft RPA Orchestrator Package

The Worksoft RPA Orchestrator package consists of the following components:

Component	Description
Worksoft Orchestrator (version).exe	Executable that installs Worksoft RPA Orchestrator.
SqlScripts.zip	Zip file contains database scripts that create and upgrade RPA databases.

Worksoft Portal

Before you install RPA Orchestrator, verify that you have installed the following products and services:

Component	Description
Authentication service	This service is an identity provider for Worksoft products, and it should be installed on the same server as Worksoft Portal.
Worksoft Portal	Worksoft Portal is an administration tool that registers database settings, licenses, users, tenants, and email SMTP settings. RPA Orchestrator leverages this information.
Cryptography service	This service exports Certify processes to RPA Orchestrator.
Capture Documentation service	This service is needed if you are generating documentation.
Certify Results UI	This service allows you to view detailed Certify results of RPA Orchestrator executions.

When installing Worksoft Portal, use the external URL for the Authentication service, and do not use a localhost. The Portal has a discovery service that tells applications like RPA Orchestrator where to look for the Authorization service. If you use a localhost, the applications will break.

Go to the Worksoft Customer Portal to download the Portal and services.

For more information about installing Worksoft Portal and services, see the *Worksoft Infrastructure Services Installation Guide*.

System Requirements

Before you begin to install RPA Orchestrator, verify that your environment has the needed system requirements. For information about system requirements, see the Worksoft Help Portal.

Configuring Your Application Server

To transform your application server into a web server to host RPA Orchestrator, Microsoft® Internet Information Services (IIS) must be installed, and the Server Manager must be configured.

These procedures assume that you have not already configured your IIS. If you have already set up the Roles and Features, verify that the following Role Services on page 13 have been selected.

Adding Roles and Features

The Server Manager allows you to add specific roles and features to your web server that are required for Worksoft products.

▶ *To add roles and features to your web server:*

1   From the Start menu, select **Server Manager**.

    The Server Manager opens.
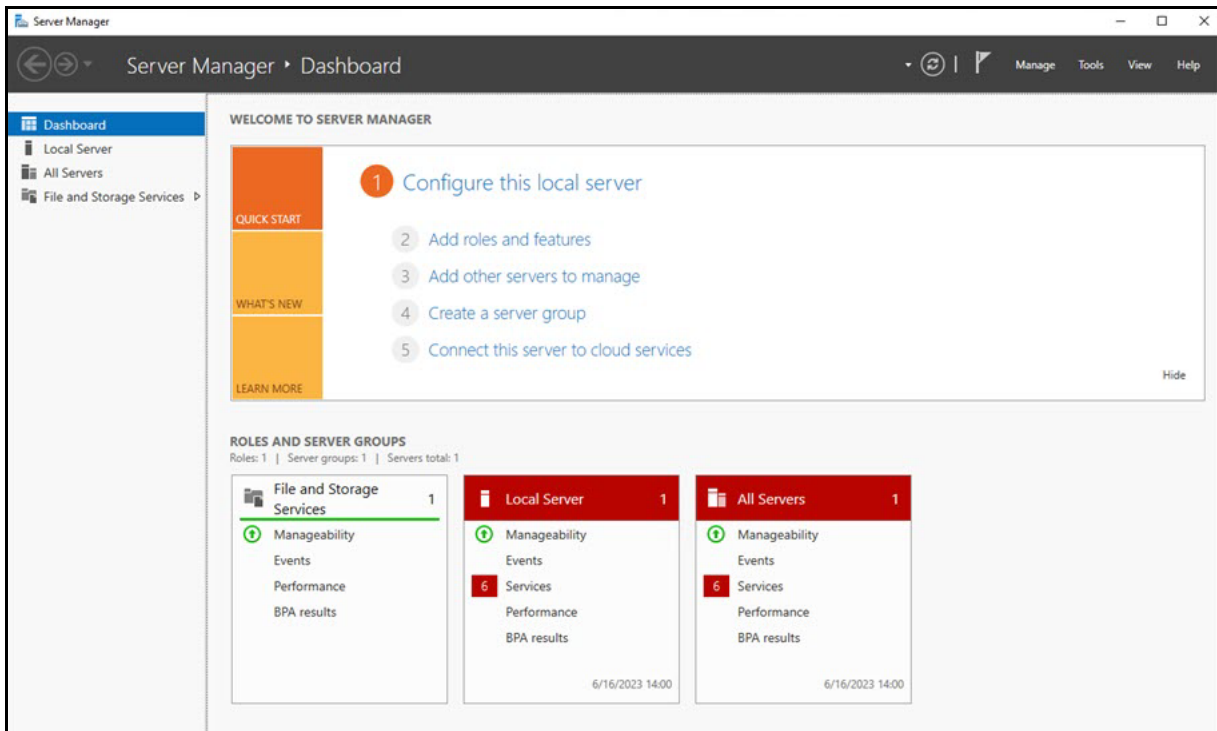
2   In the Navigation pane, select **Dashboard**.

3   In the Summary Tasks pane, select **Add Roles and Features**.

The Add Roles and Features Wizard opens.
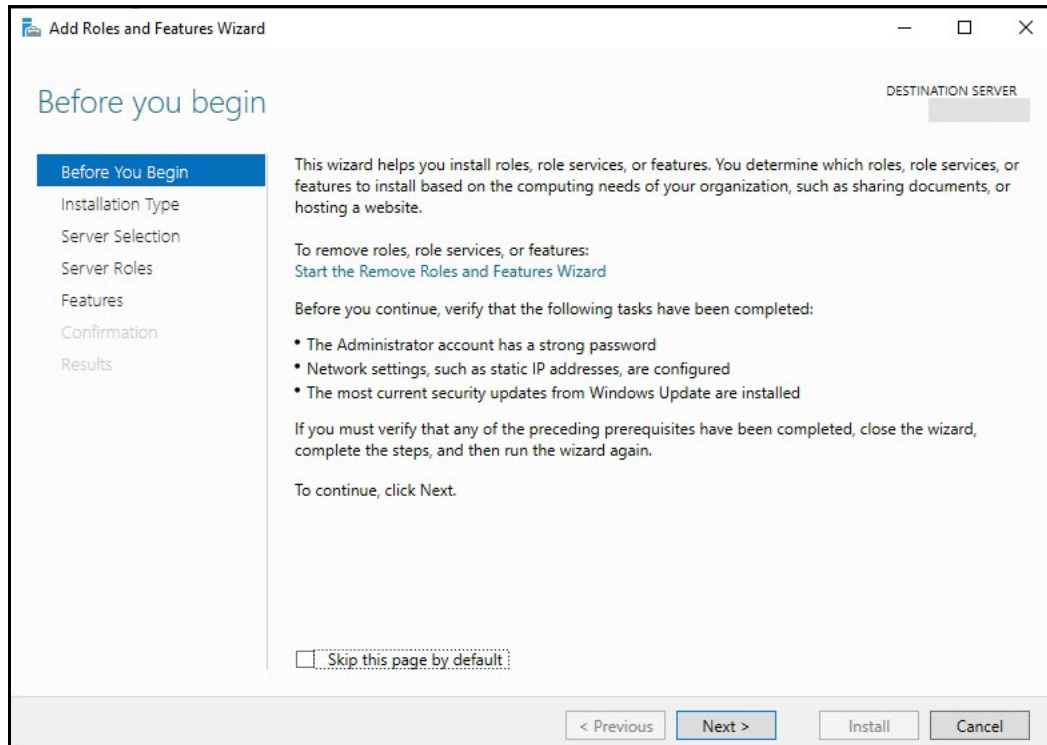
4   Click **Next**.

The Select Installation Type page opens.
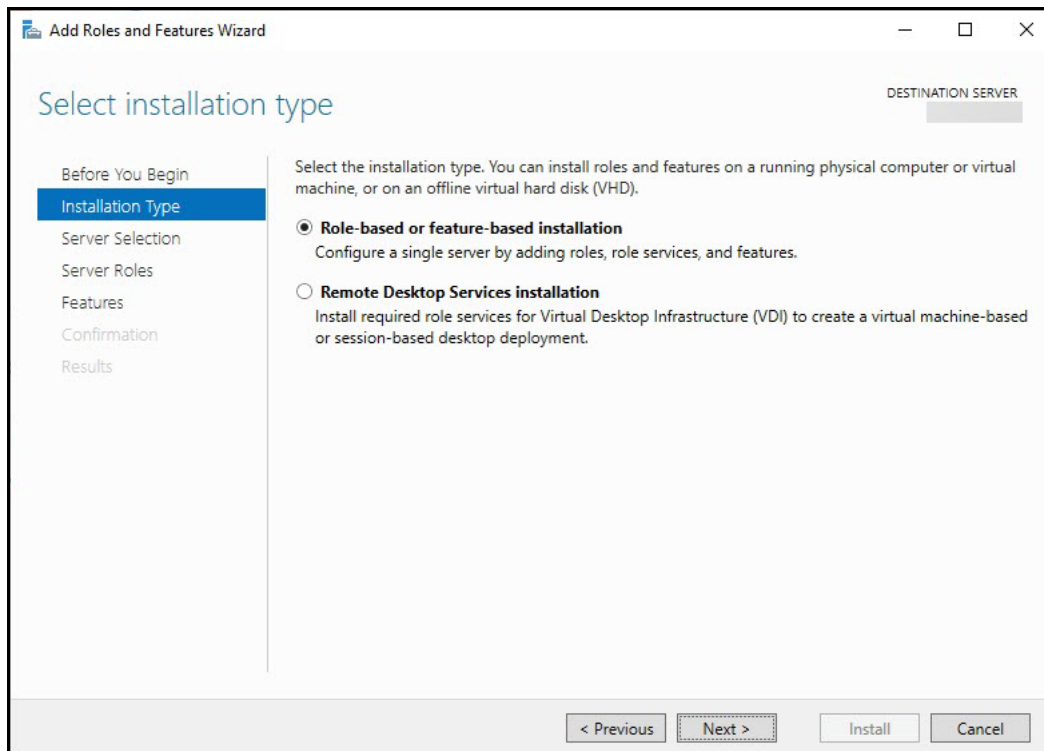
5   Select the **Role-based or feature-based Installation** option.

6 Click **Next**.

The Select Destination Server page opens.
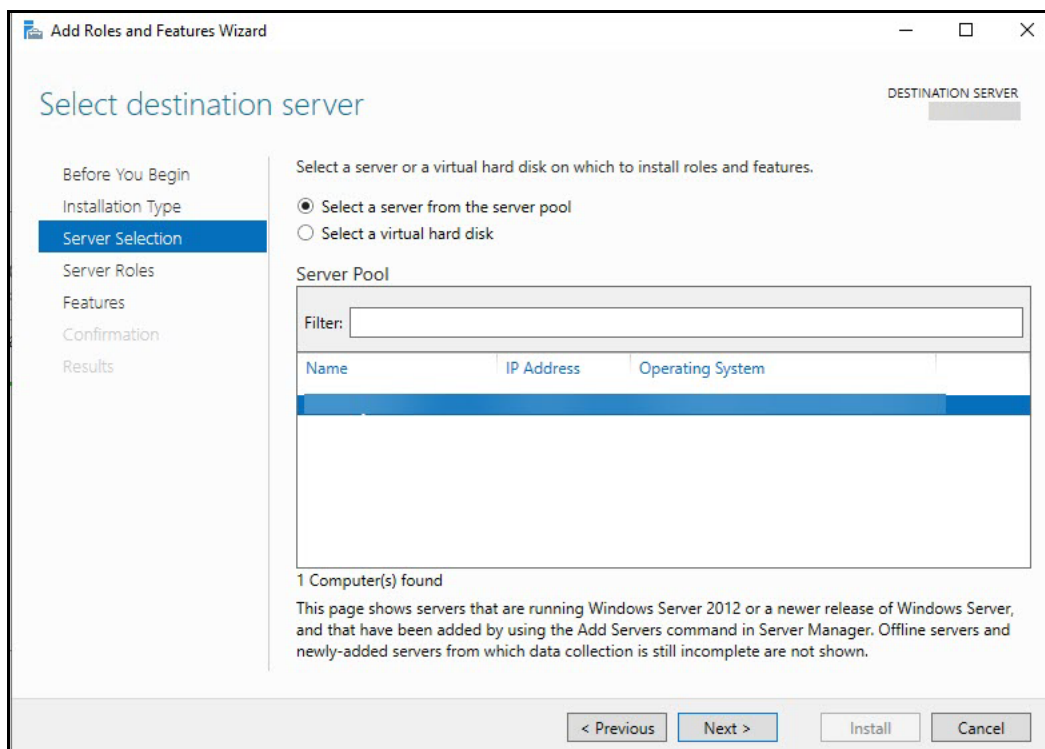
7 Select a server.

8 Click **Next**.

The Select Server Roles page opens.
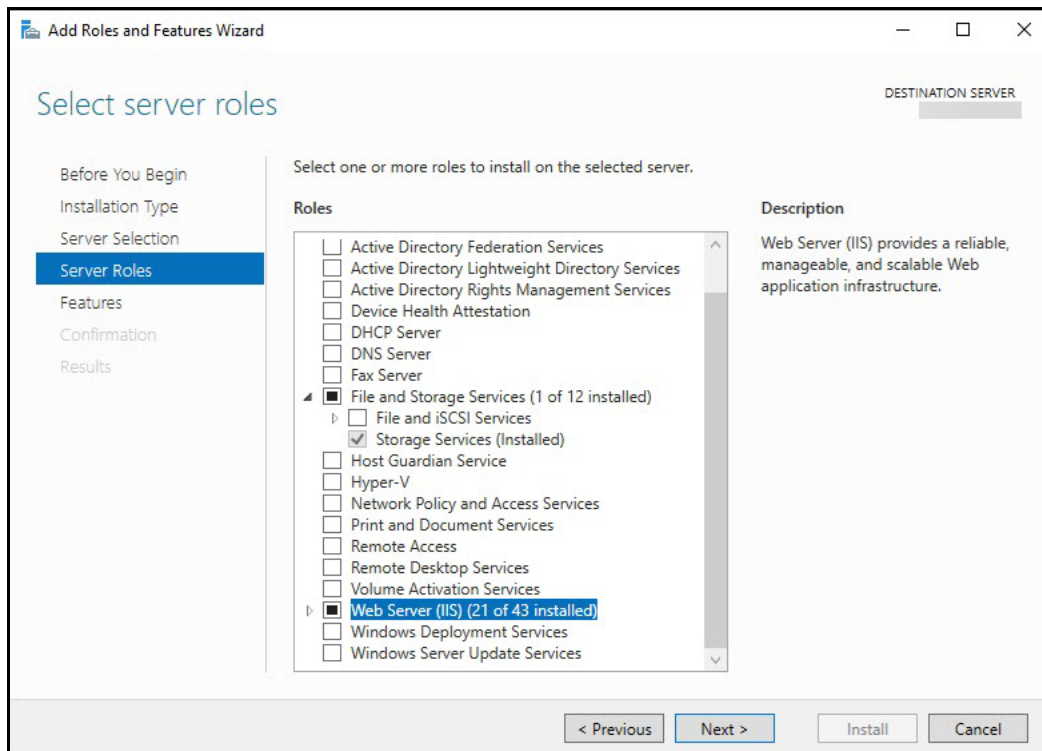
9   From the Server Roles list, select the following roles:

- **File Services**
- **Web Server (IIS)**

10   Click **Next**.

The Select Features page opens.
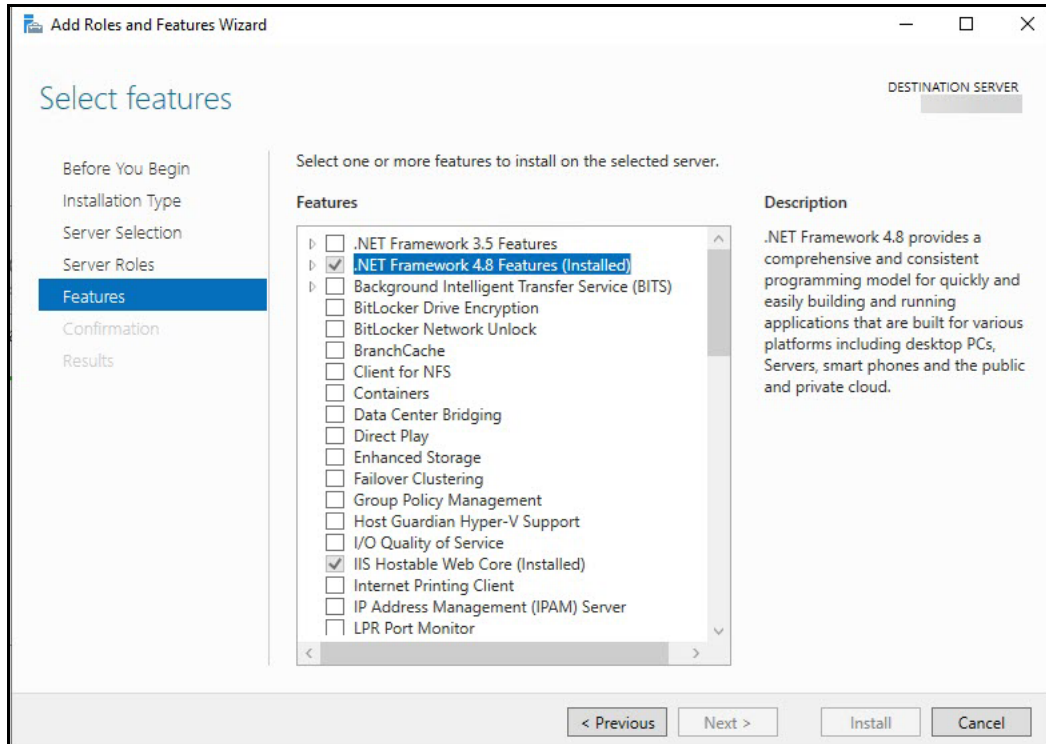
11 Select the following features:

- **.NET Framework 4.8 Features** and all of its child nodes

- **WCF Services** and all of its child nodes

- **IIS Hostable Web Core** and **Media Foundation**

12   Verify that **Message Queuing Services** and **Message Queuing Server** are enabled.
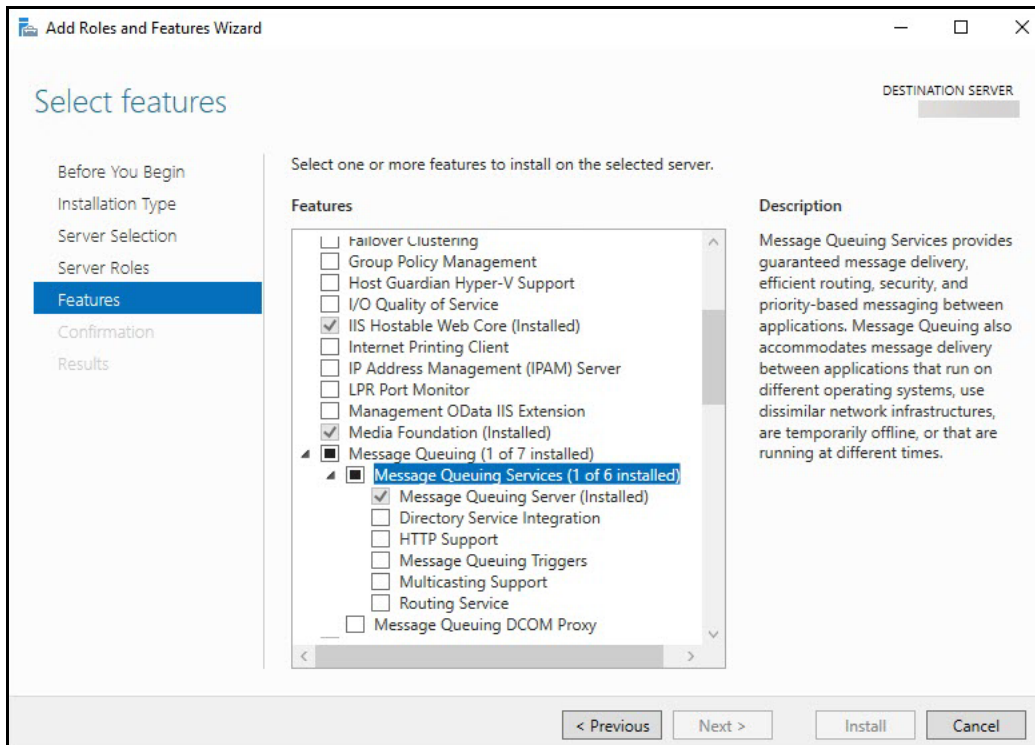
13   Use the scroll bar to verify the **Windows Process Activation Service** is enabled with the following child nodes:

- **Process Model**
- **Configuration APIs**

14   Click **Next**.

Configuring the Web Server Role (IIS)

The Web Server Role (IIS) page opens if you have not already installed the web server.

1   In the Navigation pane, click **Role Services** under Web Server Role (IIS).

The Select Role Services page opens.

2 In the Role Services list, use the scroll bar to select the following services.

If you have already set up the Roles and Features, verify that the following services have been selected.

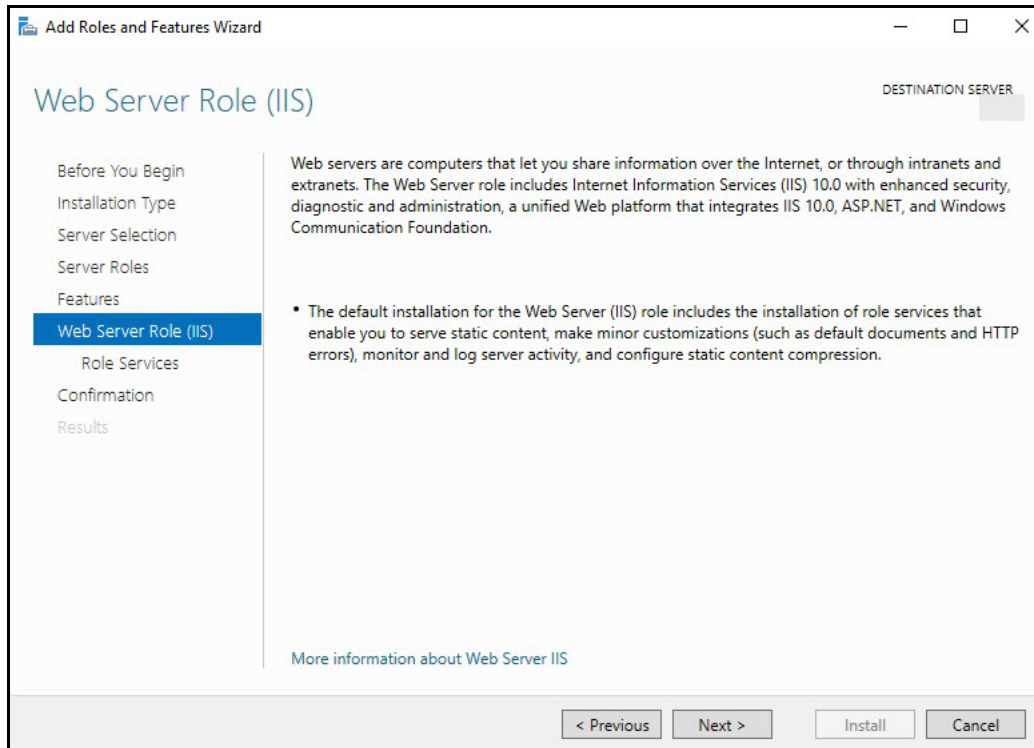| Node	Child Nodes
Common HTTP Features	Default Document
	Directory Browsing
	HTTP Errors
	Static Content
	WebDAV - Verify that this option is disabled. Worksoft's RESTful Services will not work correctly if enabled.
Health and Diagnostics	HTTP Logging
	Request Monitor
Performance	Static Content Compression
	Dynamic Content Compression
Security	Request Filtering
	Basic Authentication
Application Development	.NET Extensibility 4.8
	Application Initialization
	ASP
	ASP.NET 4.8
	CGI
	ISAPI Extensions
	ISAPI Filters
	WebSocket Protocol
Management Tools	IIS Management Console
	IIS Management Scripts and Tools
	Management Service

3 Click **Next**.

The Confirm Installation Selections page appears.

4 Click **Install** to install the role services.

Configuring Application/Json MIME Type Compression

After enabling Dynamic Content Compression within IIS, you must verify HTTP Compression for the application/json MIME type. Worksoft uses Dynamic Content Compression to improve performance, and HTTP compression must be enabled for the application/json MIME type.

When the Dynamic Content Compression feature is enabled, it will overwrite any previous HTTP compression settings.

▶ *To verify application/json MIME type compression:*

1   Open **IIS Manager**.

2   In the left Navigation pane, click on your server.

3   In the Management section, double-click the **Configuration Editor**.
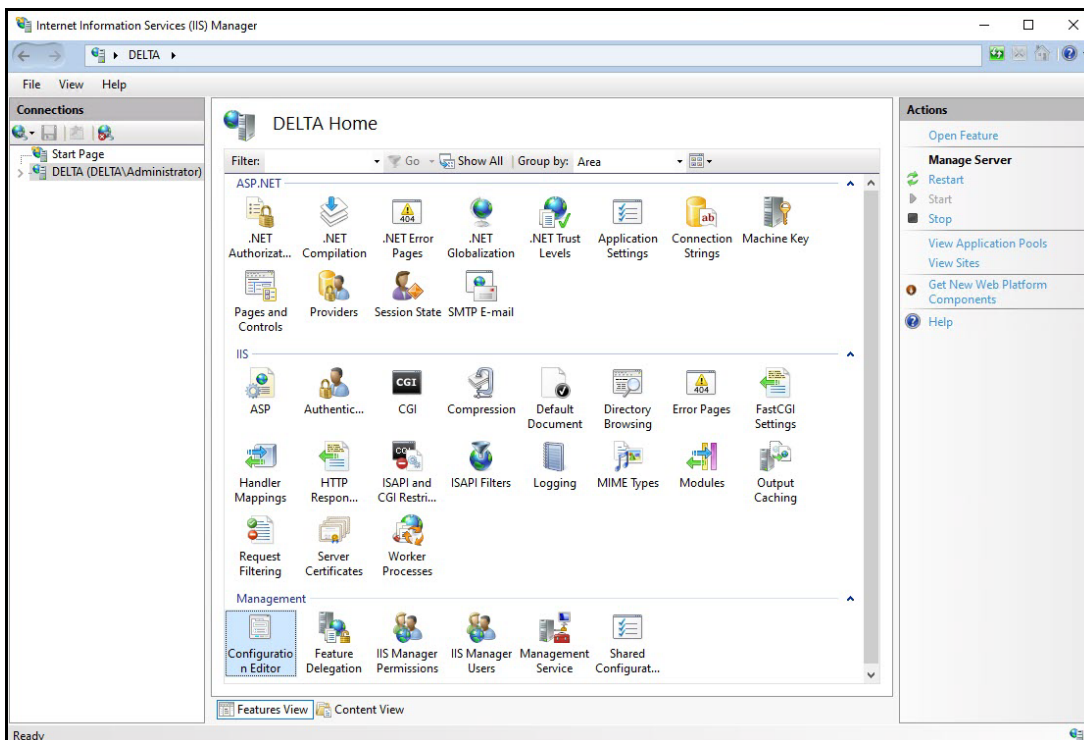
The Configuration Editor opens.

4 From the Section drop-down list, select **system.webServer > httpCompression**.
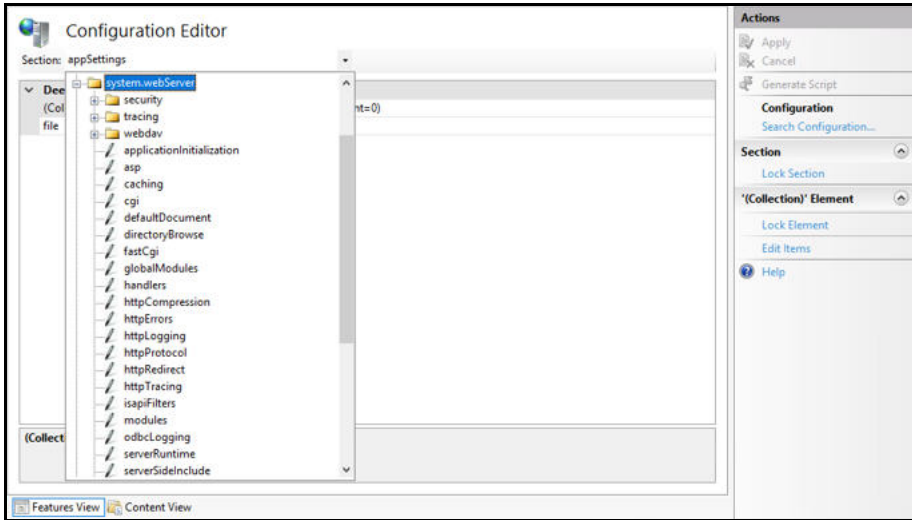
5 In the httpCompression section, click **dynamicTypes**.

6 Verify that **application/json** is listed in the dynamic compression mime types. If it is not listed, click the **Add** button in the Collection section to add it.

7   After you completed your verification or addition, click the **Close** button

The Configuration Editor opens.

8   Click **Apply** to apply your changes.

9   Verify that dynamicTypes lists a count of six.

10   Close the editor.

Enabling IIS Services

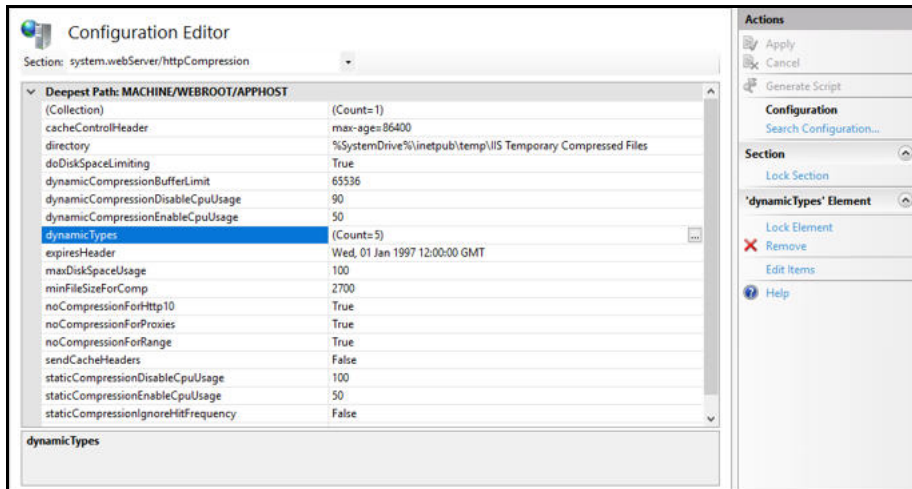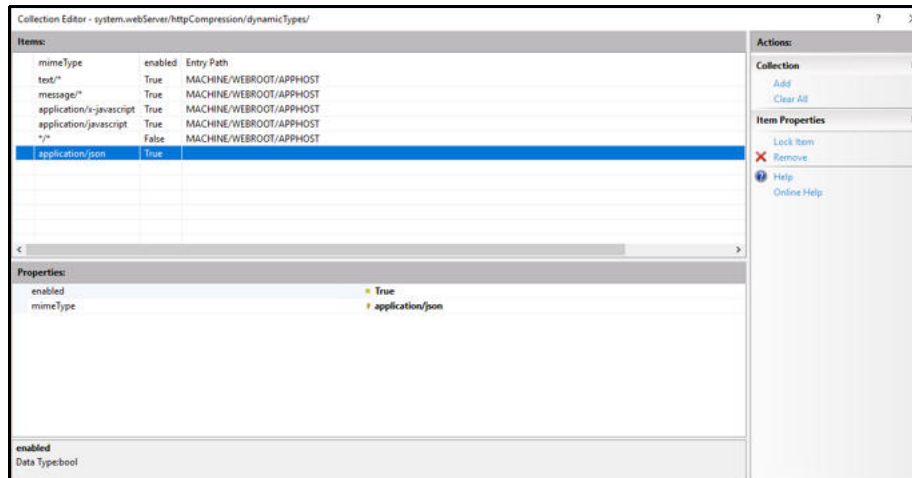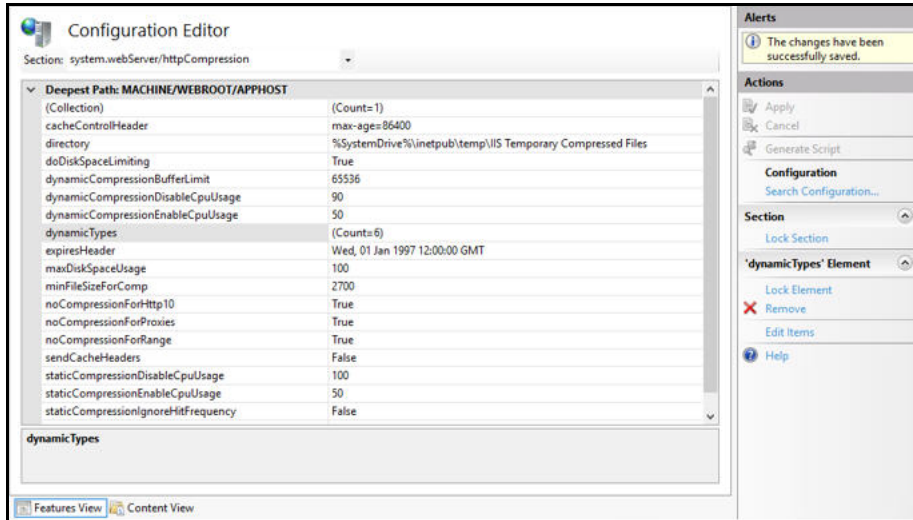You must verify that several IIS services are enabled.

▶ *To verify IIS services are enabled:*

1   If the Server Manager is not open, select **Administrative Tools > Server Manager** from the Start menu.

The Server Manager opens.

2   In the Navigation pane, select **IIS**.

3   Scroll down to the Services section.

4   In the Services pane, verify that the following services are enabled and running:

- **World Wide Web Publishing Service**

- **Web Management Service**

- **Application Host Helper Service**

- **Windows Process Activation Service**

5   If any of these window services are not running, start the services.

To start a service, select the service from the list and click **Start** in the right menu. You can also start services by going to **Administrative Tools > Services** on your machine.

Configuring HTTPS on Your Application Server

Complete the following tasks to configure HTTPS on your application server:

◆ Request an SSL Certificate from your IT department.

◆ Add the certificate to IIS.

◆ Add new binding to port 443.

◆ Verify your SSL Settings on your application server.

Chapter 2   Installing Worksoft RPA Orchestrator

In This Chapter

Verifying System Requirements

Before installing Worksoft RPA Orchestrator, verify that your environment meets the system requirements. For information about system requirements, see the Worksoft Help Portal.

Installing Worksoft Orchestrator
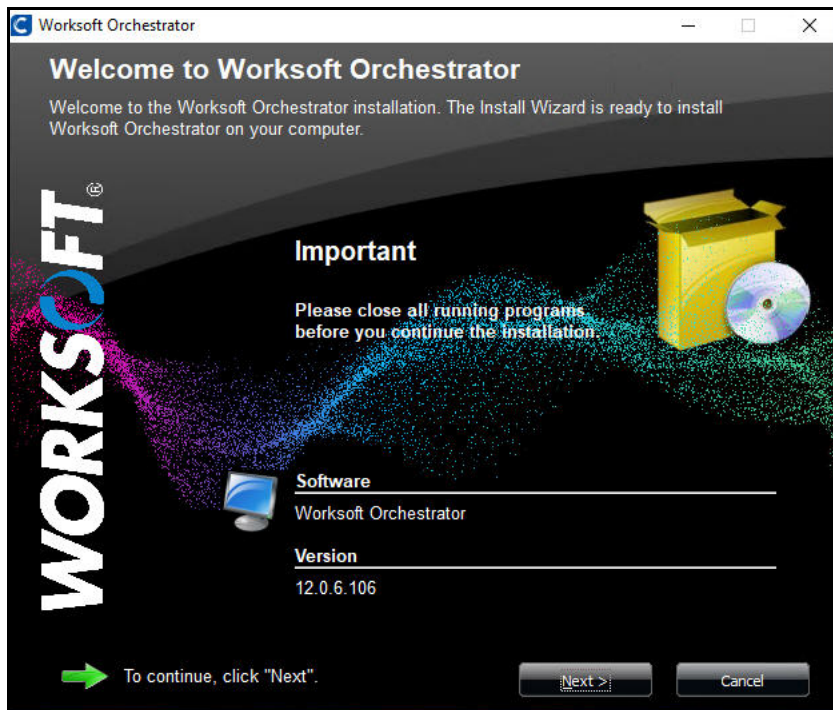
After you have configure your application server, you are now ready to install Orchestrator on your server.

▶ *To install Orchestrator:*

1   In the software distribution folder, right-click the **Worksoft Orchestrator (version).exe** file and select **Run as administrator**.

The Worksoft RPA Orchestrator Install Wizard opens.

2   Click **Next** to begin the installation process.

The Destination Folder page appears.
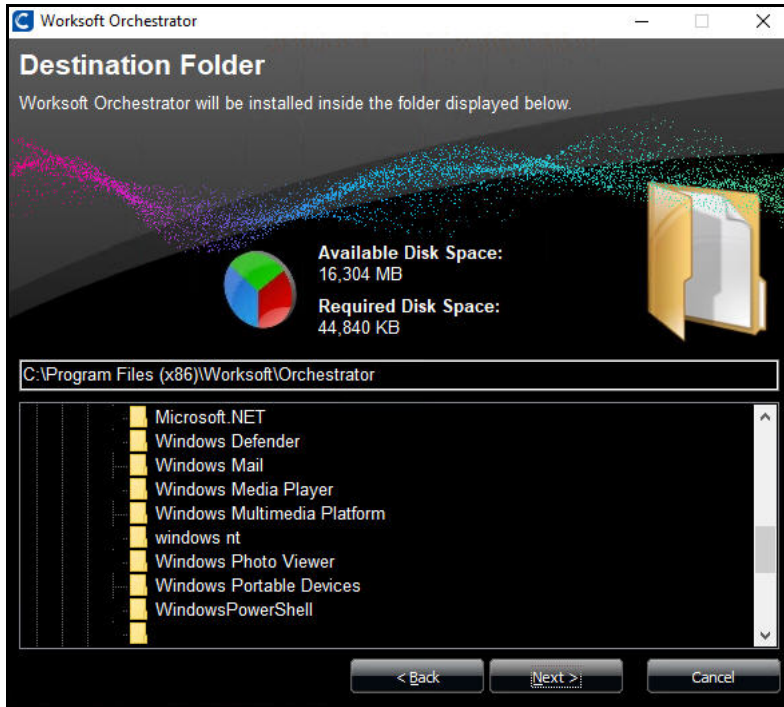
3   If you want to accept the default directory for your installation files, click **Next**.

If you do not want to accept the default directory for the installation files, select a different installation directory and click **Next**.

The Orchestrator Web Site page appears.
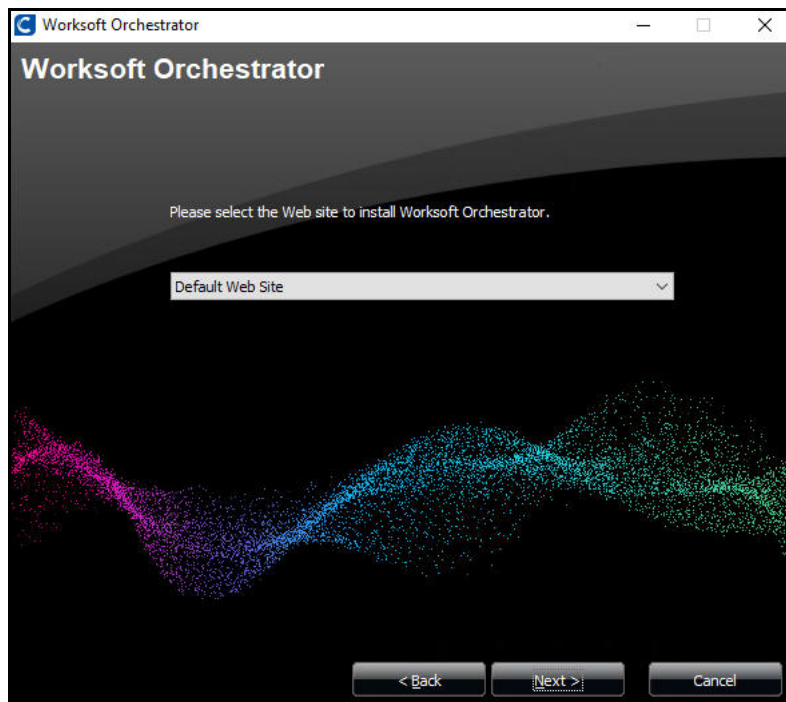
4   If you want to accept Default Web Site as your website, click **Next**.

5   If you have other websites configured in the IIS, select the server from the drop-down list and click **Next**.

The Worksoft Portal URL page appears.
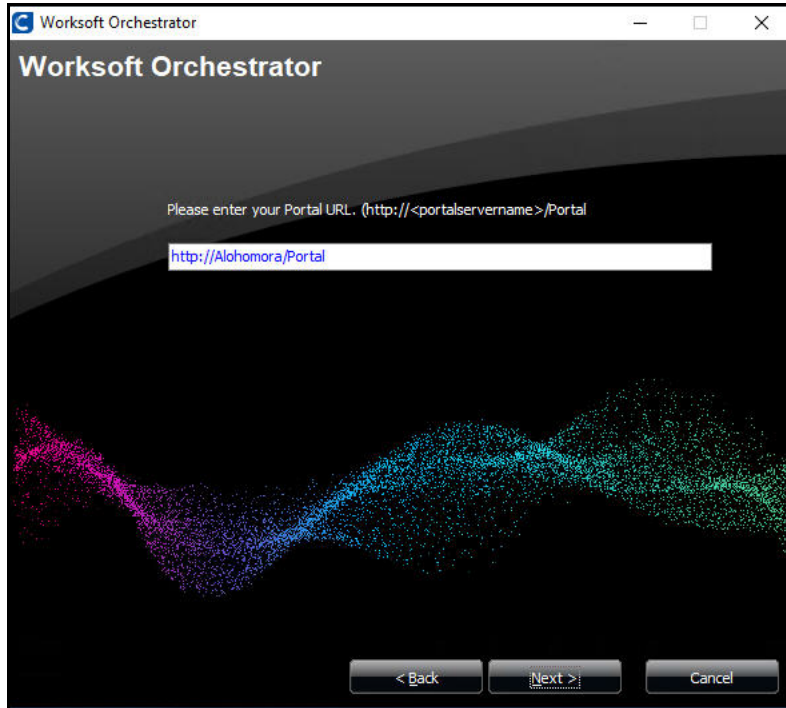
6   Enter the Worksoft Portal URL.

By default, the URL address is populated as `http://<servername>`. You will need to change it to `https` for secure authentication.

7   Click **Next**.

The Ready to Install page appears.
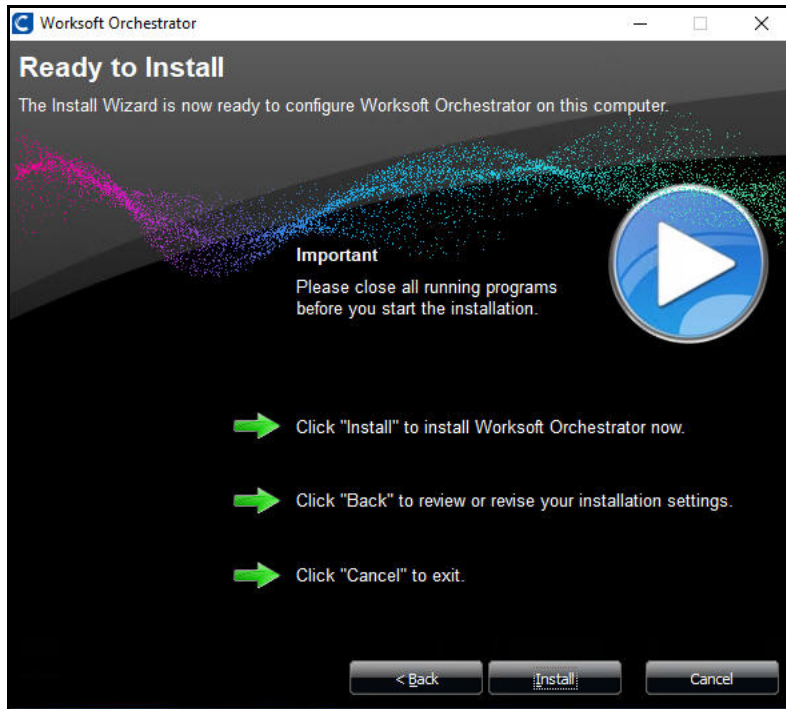
8   Click **Install** to begin the installation.

After the installation completes, the Installation Result page appears.
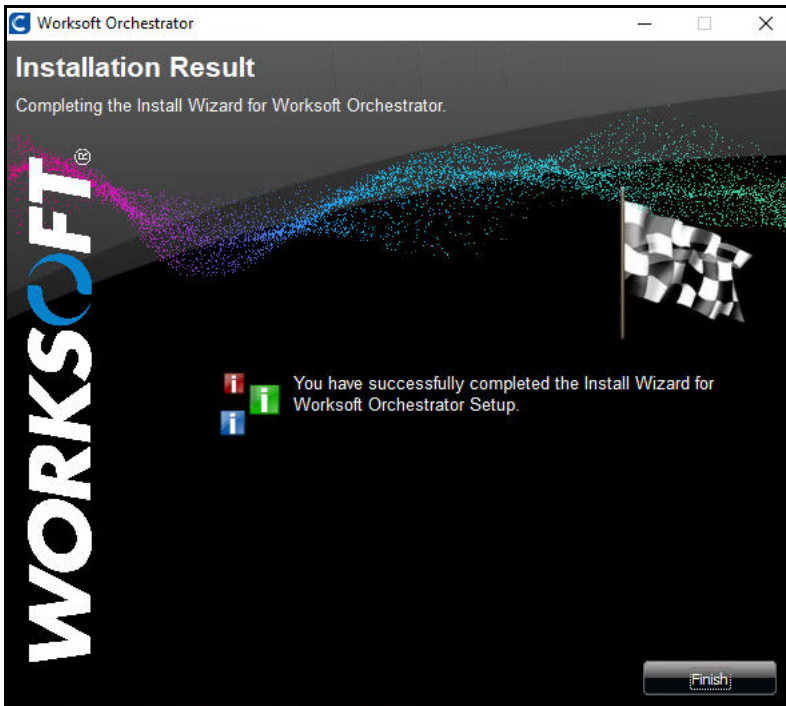
9   Click **Finish**.

Chapter 3 Creating the Worksoft RPA Orchestrator Database

In This Chapter

Overview

After installing Worksoft RPA Orchestrator, you need to verify that it is registered in the Worksoft Portal and create an Orchestrator database there. RPA Orchestrator leverages information from the Portal.

Go to the Worksoft Portal URL address that was used during installation:

`https://<portalservername>/portal`

Example: `https://servername.worksoft.com/portal`

If you have any questions about your specific URL address, please ask your IT administrator.

Registering RPA Orchestrator

The first time an administrator signs in to RPA Orchestrator through the URL address, RPA Orchestrator registers automatically in the Worksoft Portal.

From the Worksoft Portal menu, select **Product Configuration > Orchestrator** to verify the registration.

If for some reason the RPA Orchestrator does not automatically register, you can trigger the registration by manually loading RPA Orchestrator from the Orchestrator Swagger page:

`https://servername/Orchestrator/swagger`

Opening the Swagger page automatically registers RPA Orchestrator.

Database Connection Configuration Options

When you configure your RPA Orchestrator database, you can select how you want to set up your database security configuration. You need to be a superuser to configure both connections:

◆ **User Based Configuration**

◆ **Managed Service Identity Configuration**

▶ *To create an Orchestrator database with a user-based configuration connection:*

1   From the Worksoft Portal menu, select **Product Configuration > Orchestrator**.

The Database Configuration page opens.

2   Select the **User Based Configuration** option.

3   In the SQL Server field, enter the server name.

4   In the Database Name field, enter the database name.

5   If you want to use Windows authentication, select the **Use Trusted Connection (Windows)** option.

6   If you want to use SQL Server authentication, enter the SQL Server user name and password in the respective fields.

7   Select the **Trust Server Certificate** option.

8   Click **Test** to test your database connection.

A message opens stating if the connection was successful or failed. If the test fails, troubleshoot the database connection.

9   Click **OK** to close the message.

10   Click **Save** to save your database.

A message opens stating the connection was successful.

▶   *To create an Orchestrator database with a Managed Service Identity configuration connection:*

1   From the Worksoft Portal menu, select **Product Configuration > Orchestrator**.

The Database Configuration page opens.

2   Select the **Managed Service Identity Configuration** option.

3   In the Database Server field, enter the server name.

4   In the Database Name field, enter the database name.

5   In the Managed Identity ID field, enter the ID.

6   Click **Test** to test your database connection.

A message opens stating if the connection was successful or failed. If the test fails, troubleshoot the database connection.

7   Click **OK** to close the message.

8   Click **Save** to save your database.

A message opens stating the connection was successful.

Chapter 4   Installing Worksoft RPA Orchestrator Agents

In This Chapter

Installing an Orchestrator Agent

The Worksoft RPA Orchestrator leverages dedicated remote machines with Worksoft Orchestrator Agent installed on them. Digital workers use these machines to run robotic tests. Orchestrator Agent machines are dynamically created by installing Orchestrator Agent onto a remote machine.

Before you install Orchestrator Agent to a remote machine, verify that your machine has the essential system requirements. For more information, see the Worksoft Help Portal.

Warning: *Do not install Orchestrator Agent on a machine that has Worksoft Execution Manager Agent installed.*
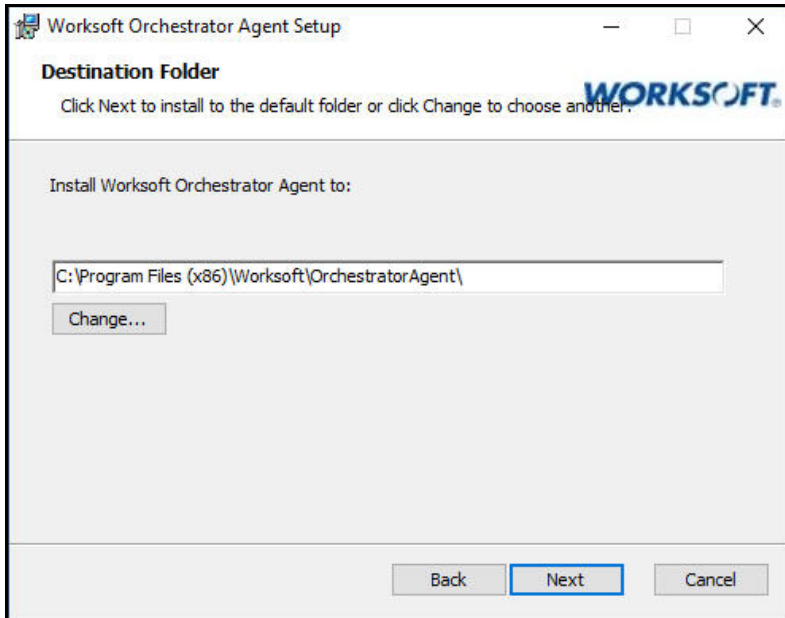
▶ *To install an Orchestrator Agent:*

1   In your software distribution folder, double-click the **Worksoft Orchestrator Agent (version).msi** file.

The Worksoft Orchestrator Agent Setup Wizard opens.
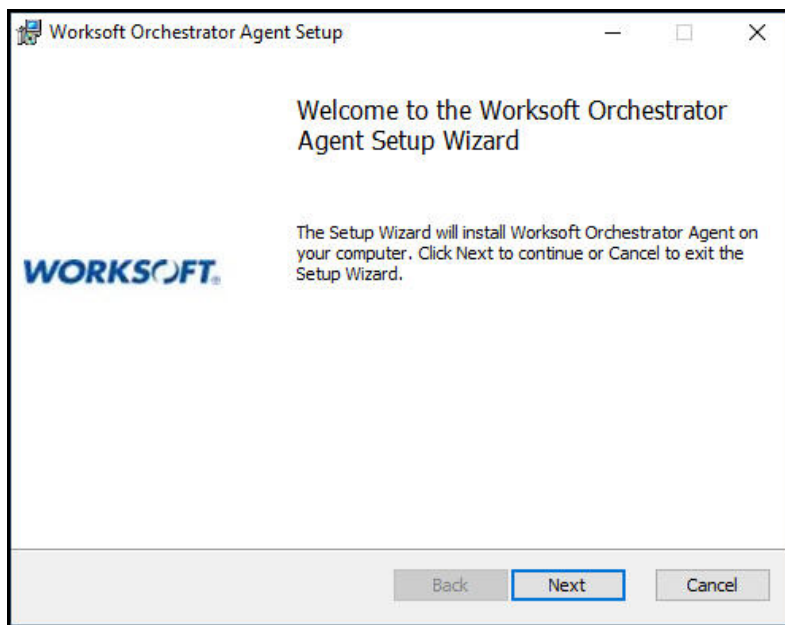
2   Click **Next**.

The Destination Folder page opens.

3   If you want to accept the default directory for your installation files, click **Next**.

If you do not want to accept the default directory for the installation files, click the **Change** button to select a different installation directory, and then click **Next**.

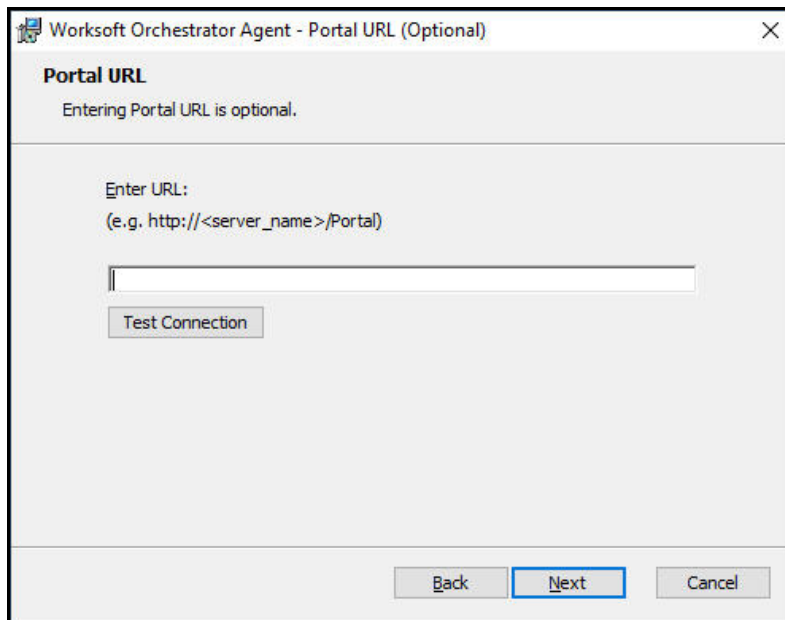The Configuration Settings page opens.
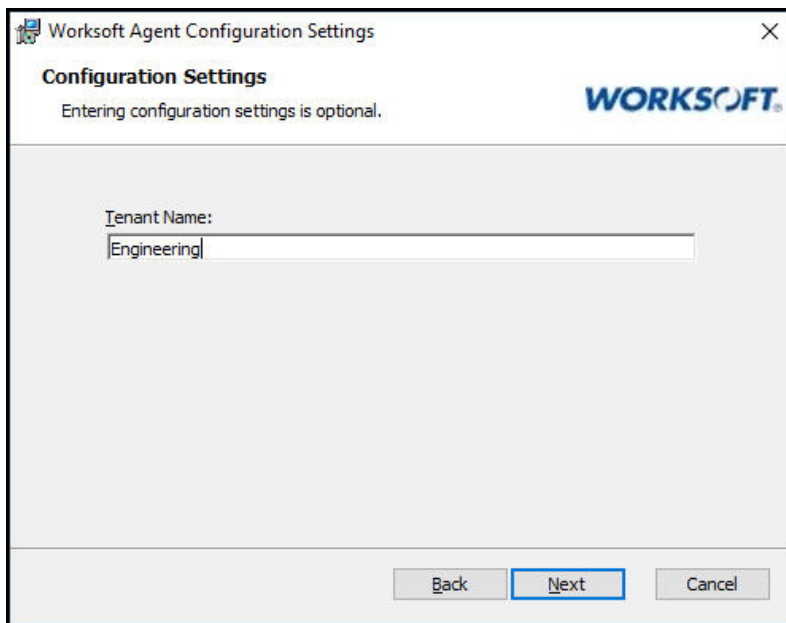
4   In the Tenant Name field, enter a valid tenant name in the Worksoft Portal.

Each Agent can be assigned to only one tenant.

5   In the Concurrent Logon Count field, enter a number.

If an invalid value is added, it will default to one.

6   Click **Next**.
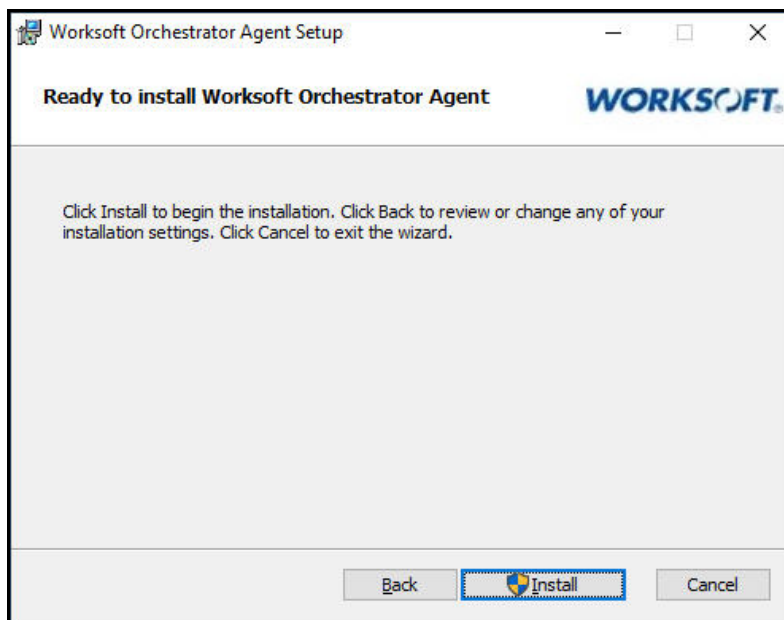
The Worksoft Portal URL page appears.

7 Enter the Worksoft Portal URL.

By default, the URL address is populated as `http://<servername>`. You will need to change it to `https` for secure authentication.
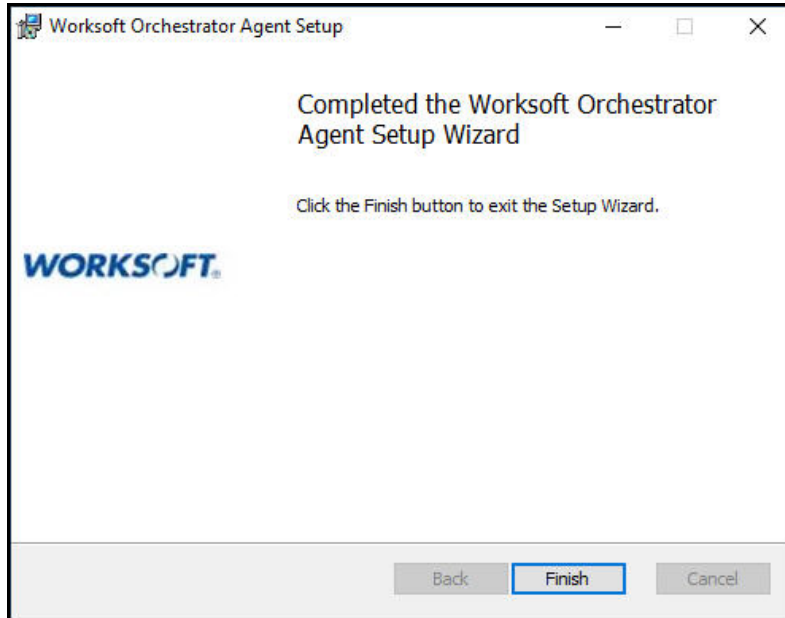
8 Click **Test Connection** to test the connection.

9 Click **Next**.

The Ready to Install page opens.

10 Click **Install**.

The Completed Installer Setup Wizard page appears.

11 Click **Finish**.

The Worksoft Orchestrator Agent installation is complete, and it will start by default.

Repeat this installation process for all of the client machines that you intend to use.

Configuring Orchestrator Agents

The desktop machine where Orchestrator Agent is installed needs to have Remote Desktop Protocol (RDP) configured.

If you have a Citrix environment, the Citrix server must be configured to support RDP sessions. Test your configuration by running **mstsc.exe**. This configuration setting is not enabled by default.

Disabling Windows Fast User Switching Mode

Orchestrator Agents require the ability to enter a user name and password on the screen. If the login screen displays a Switch User button, then the Agent will not start. Consult your IT administrator about disabling the Fast User Switch mode in the Local Group Policy Editor.

▶ *To disable Windows Fast User Switch mode:*

1 From the Windows Start menu, enter `gpedit.msc`, and press **Enter**.

The Local Group Policy Editor opens.

2 In the Local Group Policy Editor Navigation pane, drill down and select **Computer Configuration > Administrative Templates > System > Logon**.

3 In the Setting pane, double-click **Hide entry points for Fast User Switching**.

The Properties dialog box for this setting opens.

4 Select the **Enabled** option.

5 Click **OK**.

Appendix A   Worksoft RPA Orchestrator Silent Installation

Install with all defaults:

Install on default path `C:\Program Files (x86)\Worksoft`:

`<InstallerPath>\WorksoftOrchestrator.exe /s`

Provide Non-default website:

`<InstallerPath>\WorksoftOrchestrator.exe /s`

Provide portal URL during silent install:

`https://<portalservername>/portal /s`

Example: `https://servername.worksoft.com/portal /s`

Provide default install location override:

`<InstallerPath>\WorksoftOrchestrator.exe /s TargetDir="C:\Temp\"`

Provide Install log location override:

The default installation log is located at **%userprofile%** of the user who installed Worksoft RPA Orchestrator.

`<InstallerPath>\WorksoftOrchestrator.exe /s /l=C:\temp\OrchestratorInstalllog.txt`

Silent Uninstall:

`WorksoftOrchestrator.exe /s MODIFY=FALSE REMOVE=TRUE UNINSTALL=YES`