Process inVision - Benefits and Features

Automation Anywhere Process inVision allows you to Record all the activity that you perform on the screen. It allows you to document any process with a simple Record. Process inVision captures the keyboard and mouse movements along with the screens in use with intelligent process steps.

All the activity/process is recorded and saved for further analysis on optimization of the processes in multiple ways.

**Unique Features**
1. Intelligent capture of steps for business and IT process.
2. A sleek and state of the art UI which makes it easy to use.
3. No registration or login required.
4. No programming knowledge required.
5. Simple to use and manage.

**Benefits**
1. Very easy to use - no programming knowledge is required.
2. Better collaboration between employees and divisions.
3. Can be used for cross functional training.
4. Monitors processes that can be used for automation.
5. Increases transaction speed.
6. Huge savings in time and costs for explaining processes.
7. Easy GUI for administrator.

**System Requirements**
The following system requirements are mandatory for proper functioning of Automation Anywhere Process in Vision.

Details:

**Supported Operating Systems**
Microsoft Server 2012 R2, Microsoft Windows Server 2008 R2, Microsoft Windows Server 2003, Microsoft Windows 8 (32 and 64 bit editions), Microsoft Windows 7 (32 bit and 64 bit editions), Microsoft Windows Vista (32 bit and 64 bit editions), Windows XP.

**Recommended System Specifications**
Intel Pentium i5 or i7 having 3.0 GHz or higher, 4 GB of RAM, 100 MB free space on hard drive for installation, 1024 x 768 or higher resolution monitor, Mouse or other pointing device, Microsoft Internet Explorer 6.0 or later.

**Additional Requirements**
.NET Framework is required to run Automation Anywhere Process inVision

.NET 3.5 + SP1

**For Export**
Process inVision allows you to export the recorded process to PDF, presentation and video format. For these you need to have the following installed on your machine:

PDF - Adobe

PowerPoint - Microsoft Office 2003 onward

Windows Media Player - 9.0 onward
Font Requirements

Arial (TrueType, including Bold, Italic, and Bold Italic variations), Times New Roman (TrueType, including Bold, Italic, and Bold Italic variations), MS Serif and Tahoma fonts are required for proper viewing of software UI.

In case your Windows system fonts do not show a required font, follow these steps to install.

Click Start, and then click Run.

Type the following command, and then click OK: %windir%\fonts

On the File menu, click Install New Font.

In the Drives box, click the drive that contains the font that you want to add.

In the Folders box, click the folder that contains the font that you want to add, and then click OK.

In the List of fonts box, click the font that you want to add. To select more than one font at a time, press and hold the CTRL key while you select each font.

Click to select the Copy Fonts To Fonts Folder check box. The new font will be saved in the Windows\Fonts folder.

Click OK.

Resolution Requirements

Automation Anywhere Process inVision is best viewed for resolution of 1024 x 720 pixels and higher.
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Installing Automation Anywhere Process inVision

Automation Anywhere Process inVision follows you through a simple setup procedure to install your software.

One needs to install License File once the trial period is over. Trial period for Process inVision is 10 days.

How do I install Automation Anywhere Process inVision? After downloading the software, double-click the .exe file and follow the installation wizard.

How do I uninstall Automation Anywhere Process inVision?

To uninstall Automation Anywhere Process inVision, go to Start -> Programs -> Automation Anywhere Process inVision (the default program folder) and click Uninstall Automation Anywhere Process inVision. Follow the uninstall wizard. When you uninstall Automation Anywhere Process inVision, any processes you have recorded are not deleted.

If you no longer plan to use Automation Anywhere Process inVision, you can remove recorded process by deleting the Automation Anywhere Process inVision folder.
(The default folder location is: C:\MyDocuments\Process inVision Files.)
Introduction to Automation Anywhere Process inVision

Automation Anywhere Process inVision allows you to Record all the activity that you perform on the screen.

Process inVision captures all the activity performed step by step with screens captured and their process steps in detail.

All the activity/processes are recorded and saved for further analysis on optimization of the process.

The software demonstrates your processes in the form of screen-shots which are displayed on a Storyboard so that it is simple to visualize the process. The recorded processes can be customized by editing the captured screens for adding an extra Process Step or additional comments to an image.

One can then export the processes in various formats viz. PDF, PowerPoint and Video presentations.

Process inVision is a convenient way for business analysts to capture existing processes in an effortless manner and share it along with their team.

It has a cutting edge UI making it easy to use as it shows all the recorded actions on a Storyboard in the form of images to demonstrate the business flow.

By visualizing the process on the Storyboard the business analyst can identify possible processes for automation.

Main Features
1. Process design and re-design
2. Process mapping
3. Process documentation
4. Process analysis
5. Process automation
6. Process replication
7. Training manuals and documentation

Also See...
- Recording Processes
- Using the PI Dashboard
- Editing with PI Storyboard
- Exporting Recorded Processes
- Managing Additional Functionality
Recording Processes in PI

How to Save the Recorded Process?


Once the Process inVision is launched, the first screen that appears is the Recording window.

Another alternative is to click on Record button on the Dashboard.

Record Steps

1. Click Record button.
2. Perform necessary steps and actions and there will be Pause and Stop button options on the right hand side corner of your screen.
3. These buttons will appear for a while and then one will see a sleek bar so that recording window and actions are not hampered.
4. Different applications and actions can be executed as per the process needs and all the actions will smartly be captured and recorded.

Note: Once you hover over the bar, the Pause, Stop will be visible.

Pause/Resume

One can Pause the recording by clicking the Pause button. Once paused, Resume is shown and one can resume recording.
Stop

Once all the process steps are completed, click Stop button. Capture Summary screen appears. It displays all details of steps performed with statistical data for keystrokes and mouse click events. One can choose to Save or Cancel the process recording.

Save opens up the Save window
In the Save Process window, in Directory field, click the browse button to add new folders or to set different default folder for saved processes.
Using the Process inVision Dashboard

Dashboard is the main summary for all the processes recorded in Process inVision. It displays all the folders with its saved processes and details.

When a particular process is selected it shows its Process Property window which displays all the details.

Dashboard has the Record button to start Recording of any process, on the go.

Actions and Features of Dashboard:

- Dashboard displays two main Folders:
  1. **My Processes**: All saved and recorded processes are displayed. Sub folders can be created and processes saved will be shown according to the selection. Section on the left with their corresponding processes and their properties on the right.
  2. **My Exported Files**: All the exported files by default will be saved in this folder. However, one can create sub folders within it as per business needs.

- The details under each folder are File Name and Last Modified Date with timestamp.
- For the selected process, its PROCESS PROPERTY is displayed on the left side with different actions.
- This screen has various options to modify the recorded process property. See Additional Functionality for details.
- Click on the Edit and a new screen pops up with Storyboard and Process Steps. See details.

Other property action includes:

- Password Security for the process
- Description details for process
- Rename of the process
- Delete the entire process
- Export to PDF, PPT or Video
- Folder Management for My Processes and My Exported Files.
Managing Additional Functionality

Additional Options on recorded processes are as below:

- Description for process
- Password Protection for process
- Rename Process
- Delete Process

Folder Management for My Processes and My Exported Files

Below options can be customized for Process inVision as required:

Select a saved process from the Dashboard and its corresponding PROCESS PROPERTY will be displayed on its right.

Description for Process

Describe your process easily by typing free text available under Description of Process Property section.

Password Protection

Set a password for the recorded process for security by Password Set property under Process Property.

Once Set, there will be Change Link to change the password when required.

Note: One can Remove the password by keeping the New Password blank.

Rename Process

Rename the process simply by clicking the Rename link under Process Property.

Delete Process

Delete entire process simply by clicking the Delete link under Process Property.
The folders management for Process inVision can be achieved from the Dashboard.

Right click the folder section on the dashboard. It has options to Add New Folder, Rename Folder, and Delete existing folder.

Right click the My Exported Process folder to include sub folders under it.

Double click a folder to see sub folders.
One can right click the recorded and saved processes to see the options for Rename, Edit, Delete and Export as shown below.

<table>
<thead>
<tr>
<th>Processes</th>
<th>Last Modified</th>
</tr>
</thead>
<tbody>
<tr>
<td>DailyTask1</td>
<td>30/05/2012 12:04</td>
</tr>
<tr>
<td>ExcelToDatabase</td>
<td>28/05/2012 11:08</td>
</tr>
<tr>
<td>Monthlywage</td>
<td>05/06/2012 11:25</td>
</tr>
<tr>
<td>Startup reports</td>
<td>05/06/2012 10:17</td>
</tr>
</tbody>
</table>

For all the exported files, one can right click the output file for below options:
Editing with the Process inVision Storyboard

Once any processes is opened in Edit mode the window appears with various Edit options. The main screen is divided into two sections:

**STORYBOARD**

**PROCESS STEPS**

The recorded process steps are captured as steps with scenes/screenshots for window images with process steps.

Following Editing Options are available from Menu bar:

**Add Step**
Process Step can be added using this Action.

**Export**
This is the final output of the recorded process. The Export functionality is for PDF, PPT or Video.

**Save**
The Save button will be enabled only if changes made are not saved for the recorded process.

**Mouse Hover Options for each Step:**

When there is mouse hover over any of the recorded steps, the below options are visible for modification of the Step. Any Step can be modified using these icons.

1. **Comment**
2. **Edit**
3. **Delete**
Double Click any Step to see the Detailed View. Detailed view supports forward and backward arrows. Comment sections can be used as additional description for the step.

**STORYBOARD**

1. Displays all the Steps with images.
2. It has two views - only images and the other is images with Comments.
3. The views can easily be switched using toggle button on top left corner.

4. There is an image slider where the images can be zoomed out from thumbnails to 100% for ease of viewing.

Note: Slider is for image view only.
5. The footer displays the total Steps, Mouse Clicks, Keystrokes, Duration and Last Modified Date as statistical data.

6. Any Step on mouse hover displays the Comment, Edit and Delete functionality. One can click on the desired action for details. For comment view, only Edit and Delete options are available on mouse hover.

**PROCESS STEPS**

1. Displays all the Process Steps for each step.

2. The Process Steps are automatically inserted for each step during recording. The steps are displayed in user friendly manner for ease of understanding the step.

3. The Process Steps can be modified for any step using the Edit button.

For any modifications, the Save will be enabled. When clicked the changes get applied and the button disables.
Adding Comment

In order to add additional comments for each step, this view is used. This is vital to explain the process steps with respect to the actions that are captured.

Alternatively, when Comment icon is clicked for any step this view is show.

Note: This mode can also be easily switched by using the below view options on the left corner.

1. Click and highlight a particular step where one wants to describe the step in detail or add any comments besides the ones shown in process steps.
2. Click on the text portion beside the Storyboard step and type in as free text to describe.

Add comments with appropriate description to all the steps needed and click Save button on the top. Save will be enabled to indicate changes made are not saved.

3. The Step on Mouse hover displays two options of Edit and Delete functionality. Thus, for a step highlighted, one can Edit the image or process steps or delete the step.
Editing & Deleting a Step

Click on Edit icon or Delete icon for a particular Step, to see the below options.

These icons will be shown on Storyboard as well as Comment view for mouse hover action of any step.

**Edit Step**

1. Select Edit for a particular Step to Edit and click on the Edit icon on the right corner of the STORYBOARD section.
2. Edit Process Step window opens up, where an image and Process Steps can be edited.
3. One can Browse an image or Take a screenshot from existing windows that are open.
4. Select the appropriate option via a radio button and edit the image.
5. Process Step will be shown for a particular step which can be edited as free text.

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**Delete Step**

One can delete a particular process step by clicking on Delete icon which appears on mouse hover.

A confirmation message appears for Deletion. Once confirmed the step is deleted from all the views.
Adding a Step to a Process

Adding a step is vital where processes change with time or steps need to be inserted for clarity or transition. Editing the scene image also avoids re-recording of blur images.

Add Step to a recorded process has two options:

1. With Text
2. With Image

Click on the step where you want to Add Step After the current step:

**With Text:**

1. This option only inserts the comment or the description as a step.

2. Click Add to see the details on the STORYBOARD as shown below and the PROCESS STEP will be the same as text written.
With Image

Browse an image

1. Select this action to insert an existing image as a step After the current step and click Add. Images supported are .BMP, .JPG, .GIF, .PNG, .TIF.
2. Once an image is added one can add the Process Step Description for it.

![Add Step with image](image)

Add step After the current step.

- Browse an image:
  
  D:\My Documents\demo-HR\Scene 45.bmp

- Take a screenshot:

  - Select a window
  - Process Step:
    
    Open Legacy System of HR to follow next steps.

![Add](image)

Take a screen-shot:

1. Select a window displays all the windows that are open. Select the one you want to add as an image.
2. Add the Process Step for the screenshot captured.
3. Click Capture.
4. The screenshot with appropriate process step will be shown on the Storyboard.

Note: Process Step Description is mandatory with the image added.
Add step **After** the current step.

- **Browse an image:**
  - [Image]

- **Take a screenshot:**
  - **Select a window:** Microsoft Excel - Book1
  - [Refresh]

**Process Step:**

We copy data from legacy system to Excel.
Exporting Recorded Processes

Export is one of the key outputs for the process that is captured. After editing and saving all the relevant changes to a recorded process, it can be Exported as below: Click each to see its details of How to?

PDF File
PPT File
Video

How to Export?

**Export can be done directly from Dashboard**

**From Edit/Storyboard Screen -> Export**

**From Dashboard**

1. Select a Process from Dashboard
2. Click Export from PROCESS PROPERTY window on the right.
   - Export Options window pops up with two options.
3. Select the appropriate output via a radio button - PDF, PPT or Video.
4. There is no logo for the PPT, PDF or Video files, however one can add or remove the logo by the option provided.
5. Browse the directory where the files are stored by default under My Exported Files folder. New folders can be created under that for exporting files.
From **Edit/STORYBOARD** window:

1. Select a Process from Dashboard
2. Click Edit from PROCESS PROPERTY window on the right.
   - Edit/STORYBOARD window pops up.
3. Select Export for the Menu bar.
4. Now, select the appropriate output by clicking - PDF, PPT or Video.
Exporting to PDF

PDF is most commonly used tool to share documents via email and for print outs. It can be easily encrypted for security and shared among users. This option is useful for distribution of the process via Email, print copies of the process for ease of reading. When one selects PDF option:

PDF

PDF Example

PDF Option: PDF

1. Select Export PDF for any recorded process.
2. Add logo if required. Usually a one time setting where if a company logo is added, it will be saved for all the future export options.
3. Select the Image Area as Active Window or Desktop depending on the process requirement.
4. The STORYBOARD has window view.
5. The options Small, Medium and Large are for the images that are shown as output in the PDF. Depending on the selection the size of the output will vary.
6. For PI we follow Large: 100% Medium: 66% Small: 33%
7. Directory can be any sub-directory under My Exported Files or My Exported Files. Editing of the Directory and File Name can be done here.
8. If Export is being done the first time, it will show Exporting file message.
9. Success message appears with the path where the Exported PDF file is saved completely.
10. If Export is already done, it will display a message for Overwrite and then Export again as per the action.

Note: The files exported can be managed with different folders under the My Exported Files folder.

Example of PDF output file: All the detailed steps with Process Step Description, Annotations (Comments) will be displayed. See below one example for PDF output.
Exporting to PPT

PPT Export is one of the key outputs for presentations and training sessions. The presentations are ready for a recorded process with just a click. Powerpoint is supported from 2003 onwards for output files generated. After editing and saving all the relevant changes to a recorded process, it can be Exported to:

PPT

PPT Example

PPT Option: PPT

1. Select PPT for any recorded process.
2. Select the Image Area as Active Window (displays only active windows where actions took place) or Desktop (displays the entire desktop area).
3. The options Small, Medium and Large are for the images that are shown as output in the PPT. Depending on the selection the size of the output will vary.
4. For PI we follow Large: 100% Medium: 66% Small: 33%
5. Directory can be any sub-directory under My Exported Files or My Exported Files. Editing of the Directory and File Name can be done here.

6. If Export is being done the first time, it will show Exporting file message.
7. Success message appears with the path where the Exported PDF file is saved completely.
8. PowerPoint presentation files will be available for viewing and supports versions for Windows 2003 onwards.
9. If Export is already done, it will display a message for Overwrite and then Export again as per the action.

10. Images and process steps will be shown in each slide as per the scenes recorded with annotated comments and process steps as description details.

Example of PPT output file: See below one slide which displays all the details for a particular Step with Company logo and process step details.
Exporting to Video File

(If applicable)

Video Export creates a windows media player .wmv file for the recorded process. The Video when shared with users gives the feel of the overall captured process at a glance. Very useful when cross-functional training and to visualize the entire process for automation quickly.

After editing and saving all the relevant changes to a recorded process, it can be exported to 'Video':

**Video**

1. Select a particular process to be exported to a video file.
2. Click Export -> Video from either the Storyboard Screen or the Dashboard.
3. There are two options provided for Exporting the Video files - With Desktop or With Window.

4. Exporting message appears and the process is converted to .wmv video file.
5. Here only the captured screens will appear with appropriate mouse moves and cursor pointing for ease of viewing.
6. The first scene of video will include Company Logo on the top and Automation Anywhere branding with process name details.
Note: Process Steps and Comments are not shown in the video file.

The .wmv file can play in Windows Media Player only.
We need approx 650 MB of free disk space while exporting the video of 300 steps.