

SharePoint Maintenance Assistant

Readme

Version 1.0
09/10/2021

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1. Introduction

This document contains all essential information for the user to make full use of this Automation 360 SharePoint Maintenance Assistant bot. It includes the description of the functions and capabilities and step-by-step procedure for setup & configuration of the Bot.

1.1 Overview

The SharePoint Maintenance Assistant Bot is designed to demonstrate how Automation Anywhere's RPA tool enables a user to automate rule based repetitive process.

Here is the scenario built with this bot: Use the SharePoint Maintenance Assistant bot to connect to SharePoint Online to perform CRUD operations on files, folders, lists and sites using the Rest web services command package and Microsoft graph API using the SharePoint Online client ID, client secret key and tenant id.

1.2 Use cases

The key use cases include:

- Create a folder with specified name on shared relative path.
- Create a file in a folder with specified name on shared relative path.
- Delete a folder with a specified name on shared relative path
- Delete a file from specified folder on the relative path.
- Get information about the file(s) on a folder
- Get information about the folder(s).
- Download a file to the local drive from a specified folder on relative path.
- Upload a file from the local drive to specified folder on relative path.
- Create a SharePoint Site with specified name on the domain.
- Create a SharePoint list with specified name on the specified Site.

2. Requirements & Prerequisites

2.1 System Requirements

[Automation 360 \(Cloud deployed\) and Community Edition device requirements.](#)

Review the machine hardware specifications, operating system versions, and browser types supported by Automation Anywhere Enterprise for creating and running bots and command packages as an Automation 360 (Cloud deployed) or Community Edition user on your local machine.

2.2 Prerequisites

- Automation 360 setup to run in your machine.
- Bot creator license.
- Python 3.7 or above (lib :requests. urllib.parse)
- Folder structure and configure SharePoint Operation.xlsx in line number (5) .
- Microsoft authentications (username, password, tenant id, client id, client secret value,siteurl, domain url, hostname)
- Microsoft office 365

3. Getting Started

3.1 Quick Start

3.1.1 Setup

- Install the Bot from Bot Store into your Control Room.
- Navigate to SharePoint Maintenance Assistance bot folder within the Bot Store folder to examine the installed bots.

3.1.2 Configuration and Use

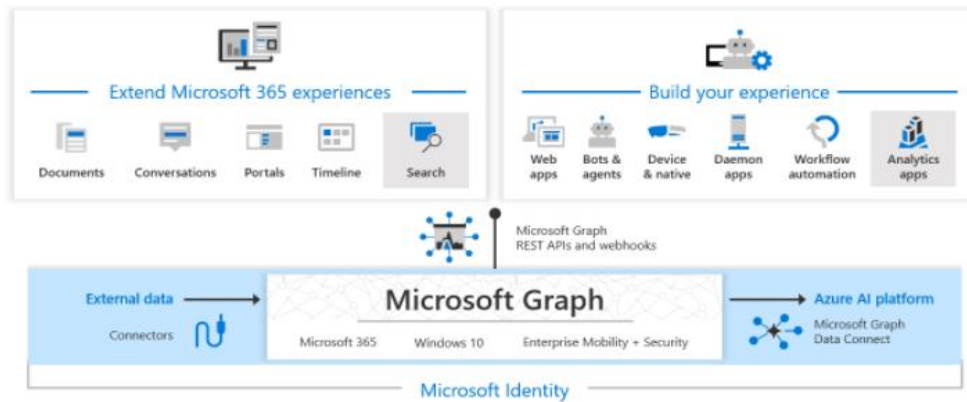
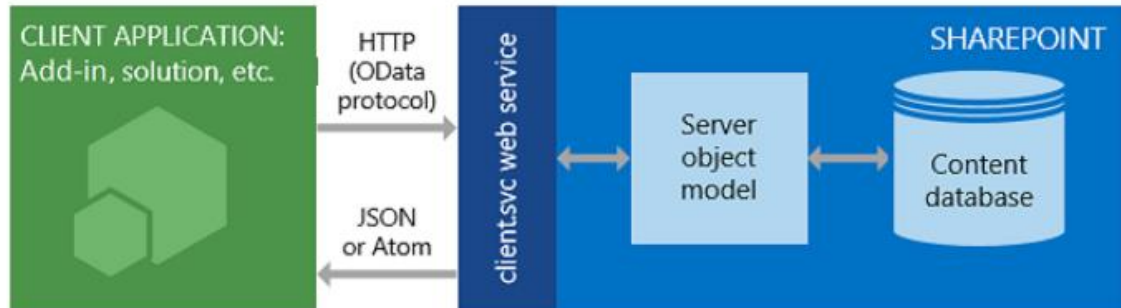
Set Microsoft Credentials preferably in the 'SharePoint Operations.xlsx' sheet 'Configuration', Provide all SharePoint operations and values inside 'SharePoint Actions Setup' sheet. Select 'Enable' to use the operations

SharePoint Maintenance Assistant Bot used to perform the following functionalities

- Create folder
- Create file
- Create sharepoint site
- Create sharepoint list
- Retrieve all information in a folder
- Delete file in a folder
- Delete folder
- Get folder information's to text file
- Download file
- Upload file

Dependencies or Pre-requisites for the initial setup

SharePoint REST service architecture



Dependencies or Pre-requisites for the initial setup:

Registering your application establishes a trust relationship between your app and the Microsoft identity platform (SharePoint)

Hints:

- App registration : <https://docs.microsoft.com/en-us/azure/active-directory/develop/quickstart-register-app>
- Configure app expose web api: <https://docs.microsoft.com/en-us/azure/active-directory/develop/quickstart-configure-app-expose-web-apis>
- Permission type : Delegated (work or school account)
- Microsoft Graph
(Files.Read.All,Files.ReadWrite.All,Sites.Read.All,Sites.ReadWrite.All,User.Read,User.Read.All,User.ReadWrite)
- Sharepoint: (AllSites.Write, MyFiles.Read, MyFiles.Write, Sites.Search.All, User.Read.All,User.ReadWrite.All)

How to invoke the method calls:

Set credentials:

- SharePoint Operation.xlsx -> Configuration(sheet)
- Parameters – username, password, tenant id, client id, client secret value,siteurl, domain url, hostname
- Assign Sharepoint Operation.xlsx file in line 5

Create Folder:

- **ServerRelativeUrl** (– This is used to create a folder with the specified name inside the relative folder URL) :
- Example: /sites/sitname/Shared Documents/
- **Folder Name** : New Folder

Create file

- **ServerRelativeUrl** (– This is used to create a file with the specified name inside the relative folder URL) :
- **File Name** (Sample.xlsx, sample.pdf, sample.docs)

Create site:

- **Site Name:** Name of the site
- **Site Description:** Description

Create list:

- **List Name:** Name of the list
- **List Description:** Description

Retrieve all information in a folder:

- **Folder Path** : (eg : /sites/sitname/Shared Documents/)
- **Output local directory** : (eg: C:\Users\Username\Documents\Sharepoint.json)

Delete file:

- **Server file path:** (eg:/sites/StaffHub/Shared Documents/filename.pdf)

Get folder information's to text file:

- **Site name** : (Name of the site)
- **Server folder path** : (eg: General/Files)
- **Output path** : (eg : C:\Users\Documents\Sharepoint\file_info.txt)

Download file:

- **Site name:** (Name of the site)
- **Server file path:** (eg Foldername/book.xlsx)
- **Local file path :** (eg: C:\Users\user\Documents\book.xlsx)

Upload file:

- **Local path:**(eg: C:\Users\user\Documents\book.xlsx)
- **File name :**(eg: Book)
- **Server folder path:** (eg: General/foldername)
- **Site name :** (Name of the site)

Select the 'Enable' option for executing operations

Please select "**Enable**" to use perticular operations

1.Create new folder	Disable
Type	Enable Disable

- Important variables used in the Initialize Bot –

VARIABLES:				
Variable Name	Type	Mandatory	Purpose	Value
sRootLogDirectory	Text	Yes	Root directory where the Process related folders exist	C:\Automation Anywhere\Bots\Sharepoint Maintenance Assistant
fInputfilePath	Text	Yes	Path where the Config file is to be placed	C:\Users\CLOUDSYS1\Documents\Sharepoint\SharePoint Operations.xlsx

*Sample Config(SharePoint Operation.xlsx) file is included in this bot (Control room file)

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 [Automation 360](#).

4.2 FAQs

Q: Can I make changes to this process/bot?

A: Absolutely. Free process/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.

For questions relating to Automation 360: [See the Automation 360 FAQs](#).

Appendix A: Record of Changes

No.	Version Number	Date of Change	Author	Notes
1	<i>1.0.0</i>	<i>09-10-2021</i>	<i>Shahid Badusha K</i>	<i>Initial version of the process</i>

Appendix B: References

No.	Topic	Reference Link
1	Overview of Automation 360	Click here
2	Guidance: Building basic Automation 360 bots	Click here
3	Guidance: Building Automation 360 action packages	Click here
4	APeople Community Forum	Click here
5	Automation Anywhere University	Click here