FOXTROT DEPLOYMENT GUIDE

Enterprise Edition

Intended for administrators in charge of planning, implementing and maintaining the deployment of Foxtrot in an organization.

Last Updated: 10/05/2018

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What is Foxtrot RPA?

Foxtrot RPA is a robust automation tool that allows non-technical users to easily automate computer tasks, by taking inefficient manual data processes off of your hands and performing them for you flawlessly, in a fraction of the time. Foxtrot RPA seamlessly works with drag-and-drop simplicity to automate tasks in web and legacy applications, or in Windows applications like Excel. No coding, programming or flow charts required. A hero that accommodates multiple skill levels, Foxtrot empowers the non-technical knowledge worker to improve productivity today.

FOXTROT RPA WORKS WITH:

→ Windows desktop applications
→ Web-based browser applications and websites
→ Microsoft Excel spreadsheets
→ PDF forms
→ Terminal emulators (AS400, IBM Mainframe, UNIX, etc.)
→ Databases / datasets
→ Files and folders
→ FTP server
→ SMTP and IMAP email servers

→ **FOXTROT SUITE**
Our Foxtrot technology is delivered in a package of products, collectively called the Foxtrot Suite. The Foxtrot Suite includes the products you see below.

→ Foxtrot Administrator
  ● Manage your product key, licenses, security settings and various other global settings.
→ Foxtrot RPA
  ● Automate & execute projects involving desktop applications, web applications, terminal emulators and more.
→ FoxBot
  ● Execute your projects written using Foxtrot RPA.

Getting Started

Whether deploying Foxtrot Suite for the first time, or upgrading an existing installation it is recommended to confirm you have the following to ensure the deployment goes smoothly.

LATEST VERSION

To ensure you have the latest features, enhancements and bug fixes, obtain the latest version of the Foxtrot Suite before beginning deployment.

PRODUCT KEY

To complete the deployment have your product key ready. Your product key will be emailed to you upon purchase of your licenses. The product key will be the following format:

XXXXX- XXXXX- XXXXX- XXXXX- XXXXX

Please contact our Customer Success Team if you do not have a product key.

Contact Us

Customer Success Team

success@enablesoft.com

800-658-1147

www.enablesoft.com

System Requirements

RECOMMENDED REQUIREMENTS

→ 2.0 gHz processor
→ 4 CPU cores or more
→ 16GB RAM
→ 500 MB hard drive space
→ 1024x768 display resolution
→ Dual monitors
→ Internet Explorer 11
→ Local administrator rights

MINIMUM REQUIREMENTS

→ 1.8 gHz processor
→ 2 CPU cores
→ 3 GB RAM
→ 300 MB hard drive space
→ 1024x768 display resolution
→ Internet Explorer 9
→ Local read, write, execute and delete permissions

SUPPORTED OPERATING SYSTEMS

→ Windows 10
→ Windows 8 & 8.1
→ Windows 7 (32-bit & 64-bit)
→ Windows Vista (SP2 or higher)
→ Windows Server 2016
→ Windows Server 2012
→ Windows Server 2008 (SP2 or higher)
→ Windows Server 2003 (SP2 or higher)

SUPPORTED BROWSERS

→ Internet Explorer 11
→ Internet Explorer 10
→ Internet Explorer 9

ZOOM LEVELS

Before you start scripting, ensure your Desktop Zoom and Browser Zoom are both set to 100%. If this isn't configured, Foxtrot RPA will not be able to correctly reidentify targets.
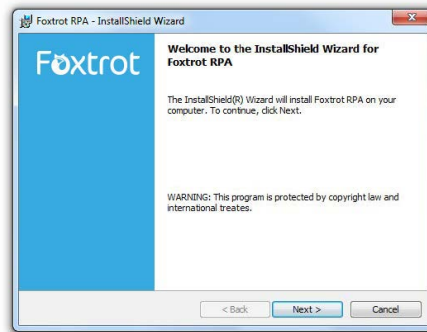
Installing the Foxtrot Suite

The Foxtrot Suite can be installed on as many machines as you desire. Follow the steps below to ensure a correct installation.

1. Log into the workstation with a Windows account that has local administrator rights.
2. **Download** the Foxtrot Suite from out latest version page.
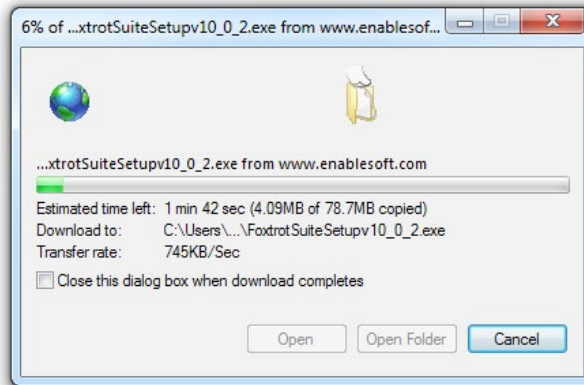
3. **Run** the installation executable on the workstation.
    - If not installed already, you will be prompted to install .NET 4.5.1 Framework and Microsoft Access Database Engine 2010

4. Click **Next** on the Welcome Screen

5. Select a **Setup Type**. The **Complete** installation is the recommended selection and will be selected by default, which will install all applications and help files. Alternatively, **Custom** can be selected to customize which Foxtrot Suite applications are to be installed. Click the **Next** button to continue. If **Complete** was selected, skip to Step 7.

6. Select the Foxtrot Suite applications to install, and click the **Next** button.
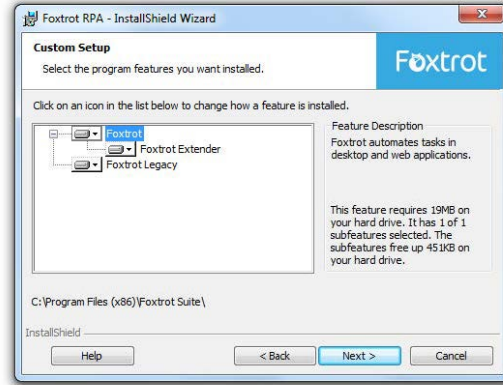

7. Select the destination folder in which the application will be installed. The recommended path will be selected by default. To change this location click the **Change** button. Click **Next** to continue.
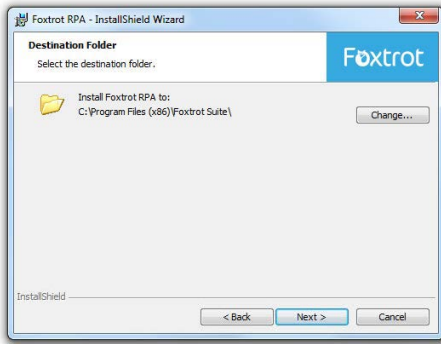
8. Once all installation options have been chosen, the **Ready to Install** screen will be displayed. Click **Install** to continue.

9. White the software is installing, the following screen will be displayed. Wait for the installation to complete. The progress bar may reach 100% then start over several times, this is normal.
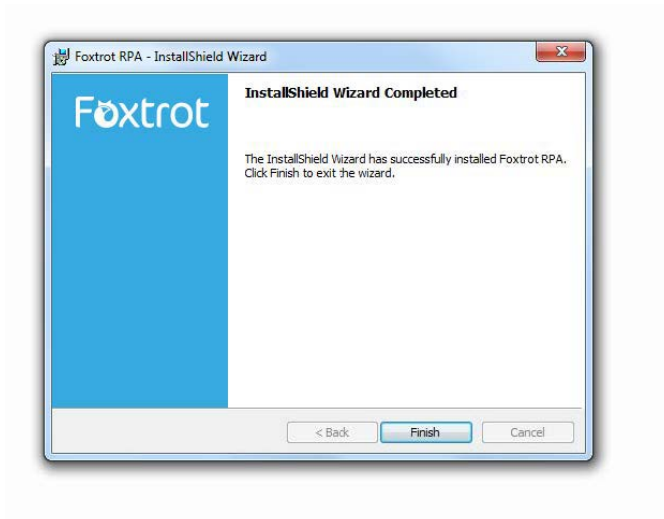
10. Once the installation has completed successfully, the following screen will be displayed. Click **Finish** to exit the installation.

Deployment Options

Deploying Foxtrot is easy! Start by following the [installation steps](#) above. Next, choose where you would like to deploy your licenses. You have a couple of options:

Hosting Licenses Locally

With this option, you can deploy each license on a workstation of your choosing. This licenses will be reserved for users on this machine, and cannot be accessed across the network from other workstations. You can have one or multiple licenses on the same machine when hosting locally.

Hosting Licenses Centrally

This is our recommended practice, and the option that the majority of our customers use. With this option, you will choose a workstation to host your licenses on and share its installation directory across your network to users within the same domain. From there, all Foxtrot users on the same domain will be able to access the licenses to use, provided they are connected to the network.

Hosting Licenses Locally

When installing Foxtrot's licenses on your computer, both the Foxtrot Suite and the licenses are installed locally, preventing you from sharing any licenses. When using this option, a license can only be accessed from the machine they are installed upon.

After following the installation steps above, the licenses must be activated using Foxtrot Administrator.

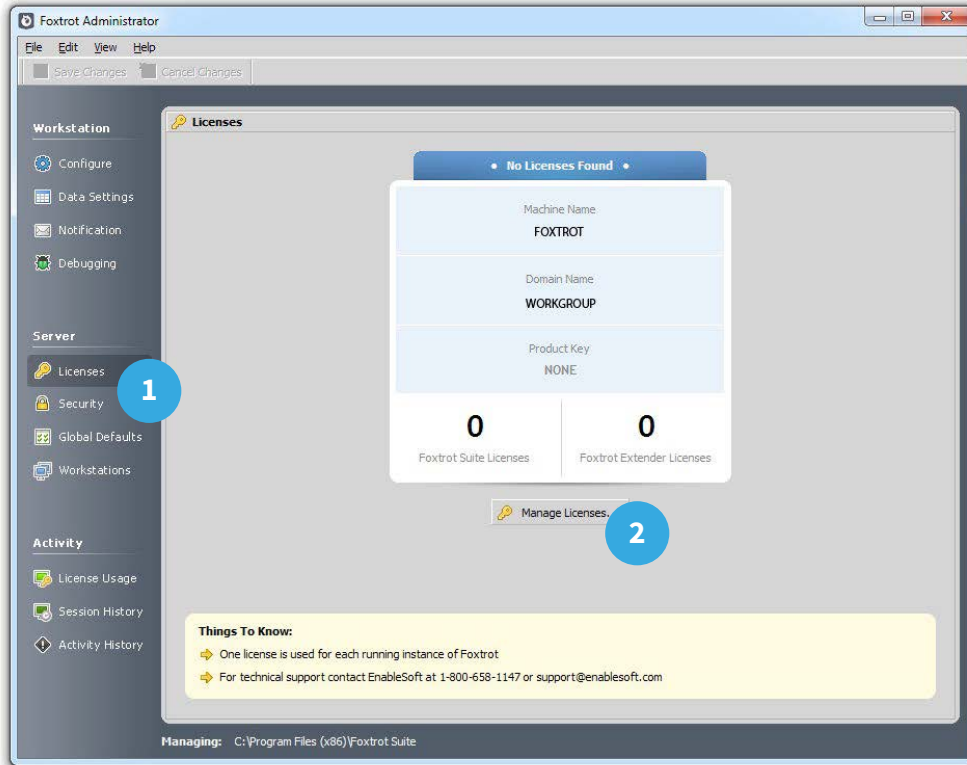1. Launch the Foxtrot Administrator program.

FOXTROT ADMINISTRATOR CRASHING?
This is a common issue we see on new installations. Luckily, we have a support article that outlines why this happens, and steps to solve the problem.

2. You will be required to enter login credentials. Use the following default Administrator account to login. This password can be changed at a later date, if you wish.

- **Username** admin
- **Password** FOXTROT

Please note this password is case sensitive. Click OK to login.

3. Once the application is opened click on the **Licenses (1)** tab, then click the **Manage Licenses (2)** button.
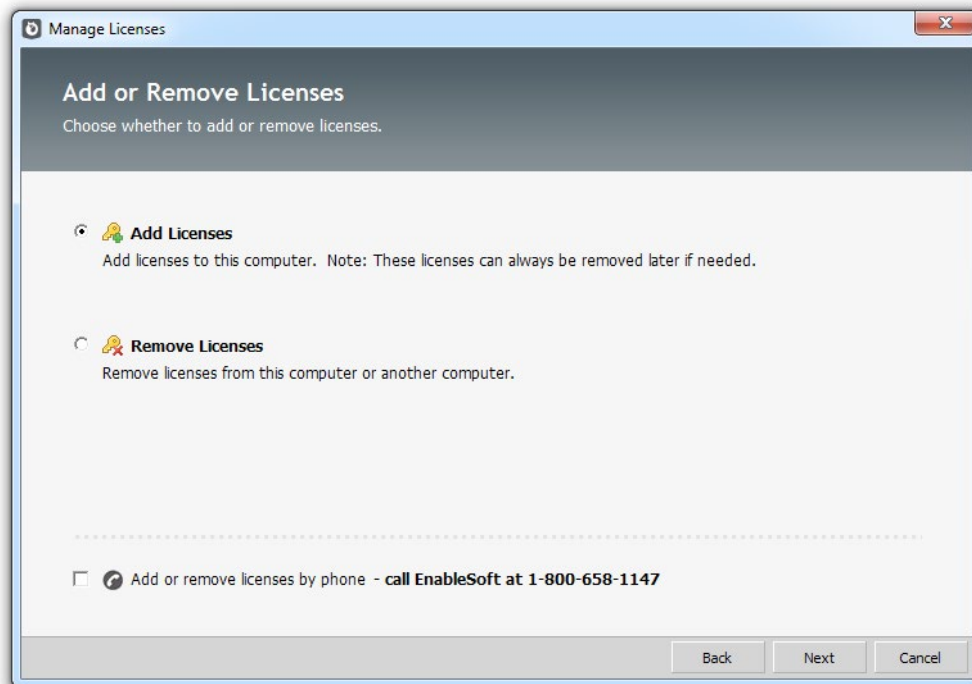

4. The **Licenses Wizard** screen will appear. Enter your **Product Key** and click **Next** to continue.
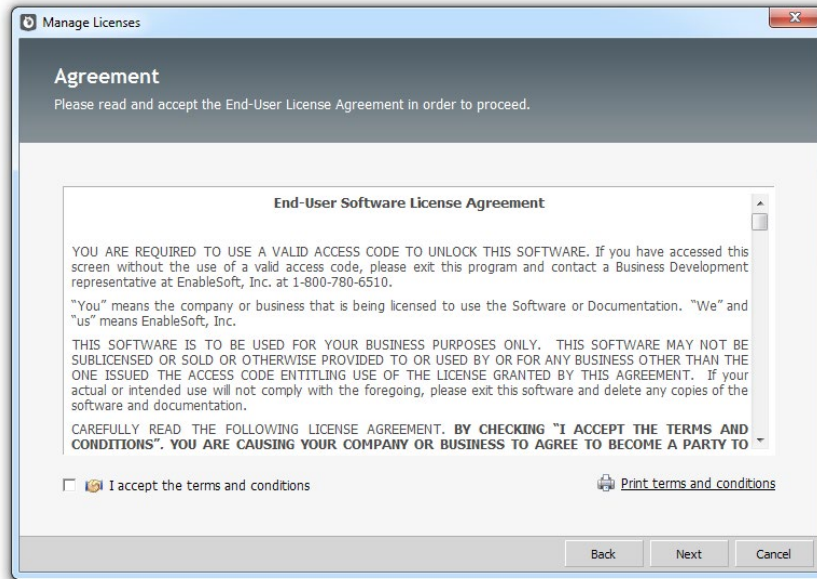
5. Confirm the product key entered. If it appears incorrect, click the **Change Product Key** link and return to the previous step. If the product key appears correct, click **Next** to continue.
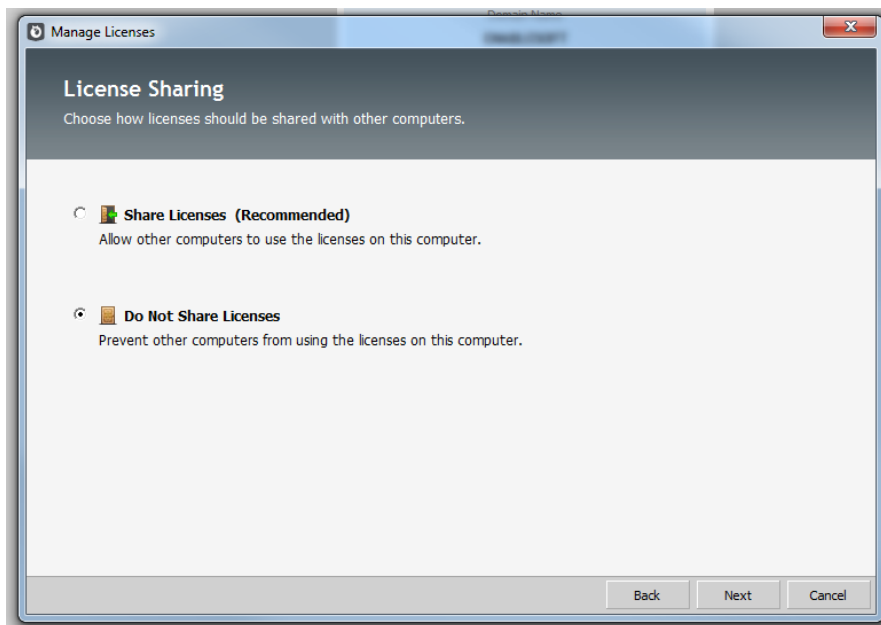

6. Select **Add Licenses** and click **Next** to continue.

7. After reading the Agreement, click the checkbox labeled **I accept the terms and conditions**. Click **Next** to continue.
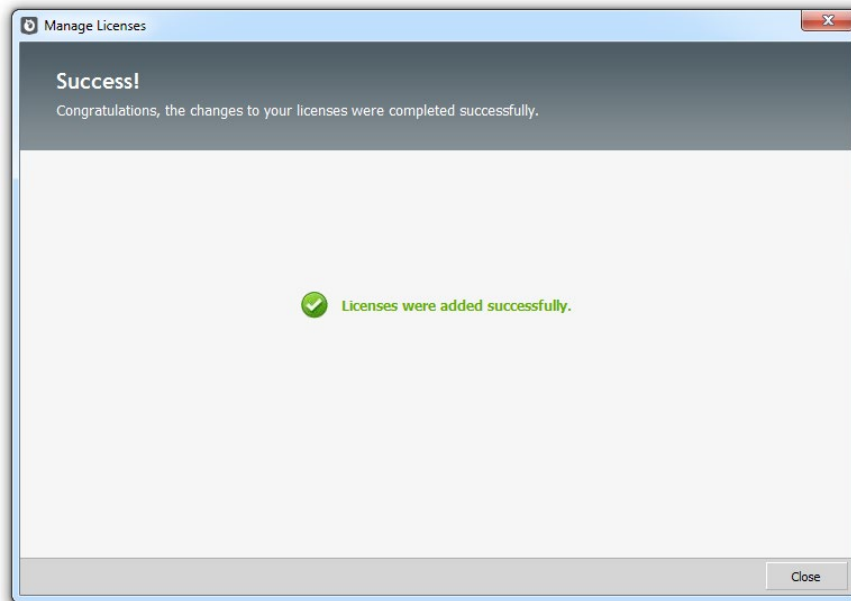

8. Select **Do Not Share Licenses** and click **Next** to continue.

9. Input the number of licenses you wish to activate in the appropriate box (Foxtrot, FoxBot or Extender) then click **Next** to activate your license(s).
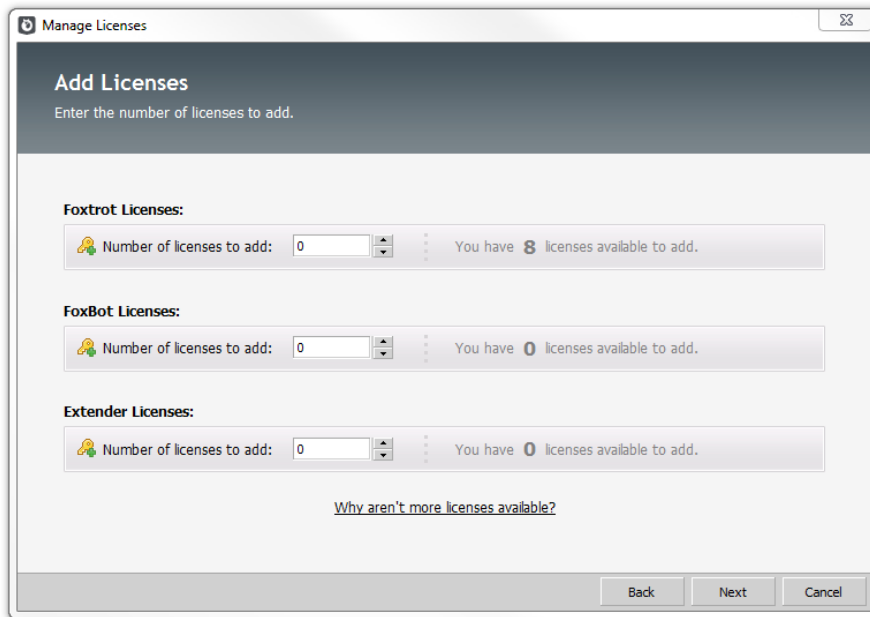
10. If successful, the **Confirmation** screen should be displayed. Click **Close** to exit the **License Wizard**.

Hosting Licenses Centrally

When hosting licenses centrally, Foxtrot is installed in a central location that manages the licenses, such as a server. This centralized server is referred to as the **License Host**. Foxtrot is then installed on user workstations, which access the licenses stored on the **License Host.**

After following these steps, user workstations that are connected to the same network and on the same domain as the License Host will be able to access your licenses. Sharing licenses across different network and/or domains is not supported.

After following the installation steps above, there are a few steps to take to share the installation path before activating the licenses.

1. Navigate to the installation folder. **Right Click** and choose **Properties**. Click on the **Sharing** tab.
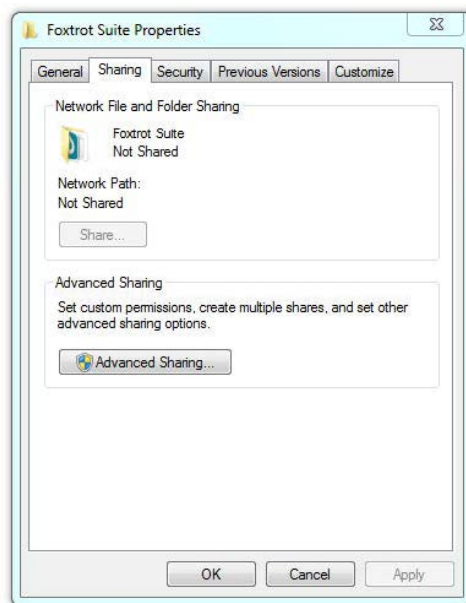
2. Depending on the permission level of the user logged on, either click the **Share** button, or click **Advanced Sharing** followed by checking the box labeled **Share this folder**.
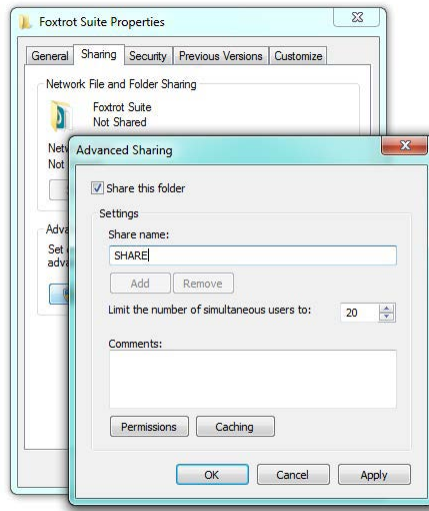
3. **All** users will need **Read, Write and Modify** permissions to this folder. If necessary, modify the permission levels of those users/groups and assign appropriate permissions.
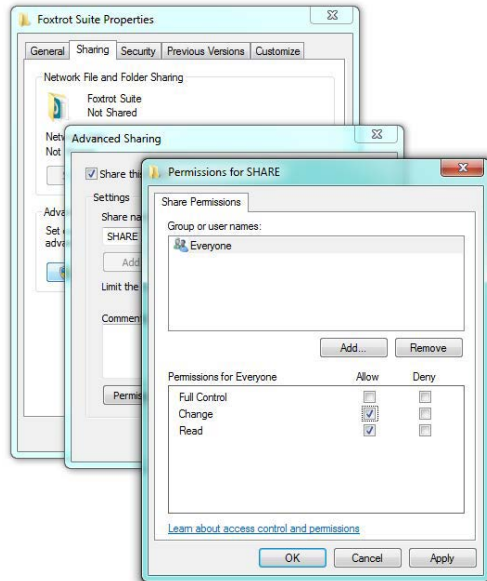
4. Click **Apply** and **OK**. Copy the **Network Path** of the shared folder. This will be the **License Path** when we activate the licenses.

Now that you've set up the installation folder to be shared, we can activate the licenses in Foxtrot Administrator.

1. Launch the Foxtrot Administrator program.
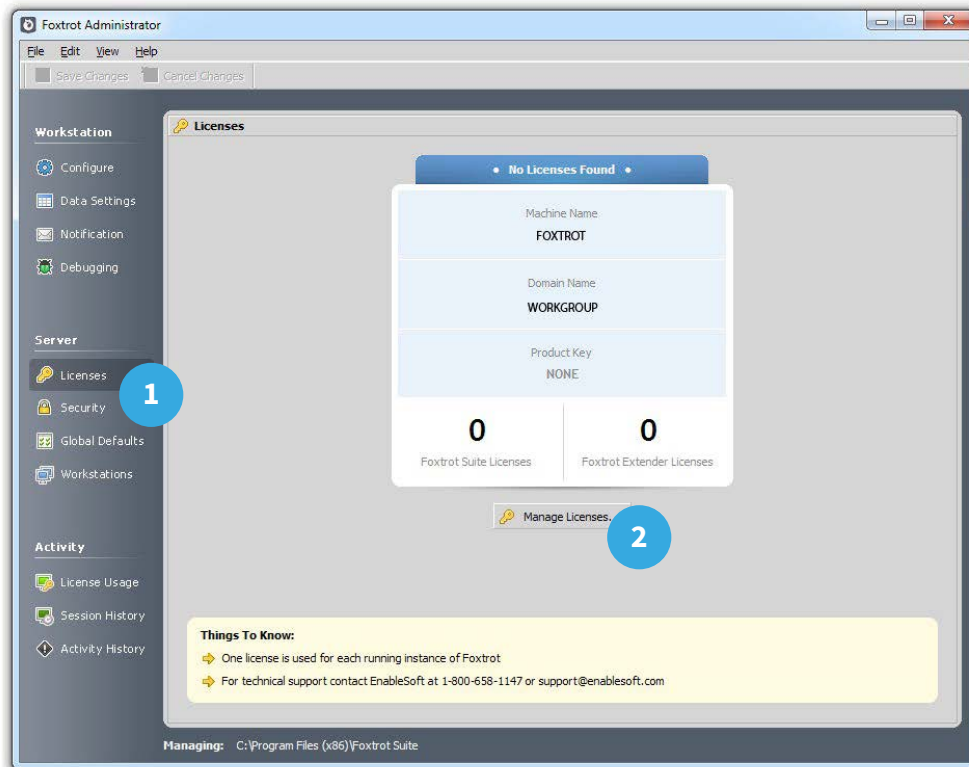
FOXTROT ADMINISTRATOR CRASHING?
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2. You will be required to enter login credentials. Use the following default Administrator account to login. This password can be changed at a later date, if you wish.
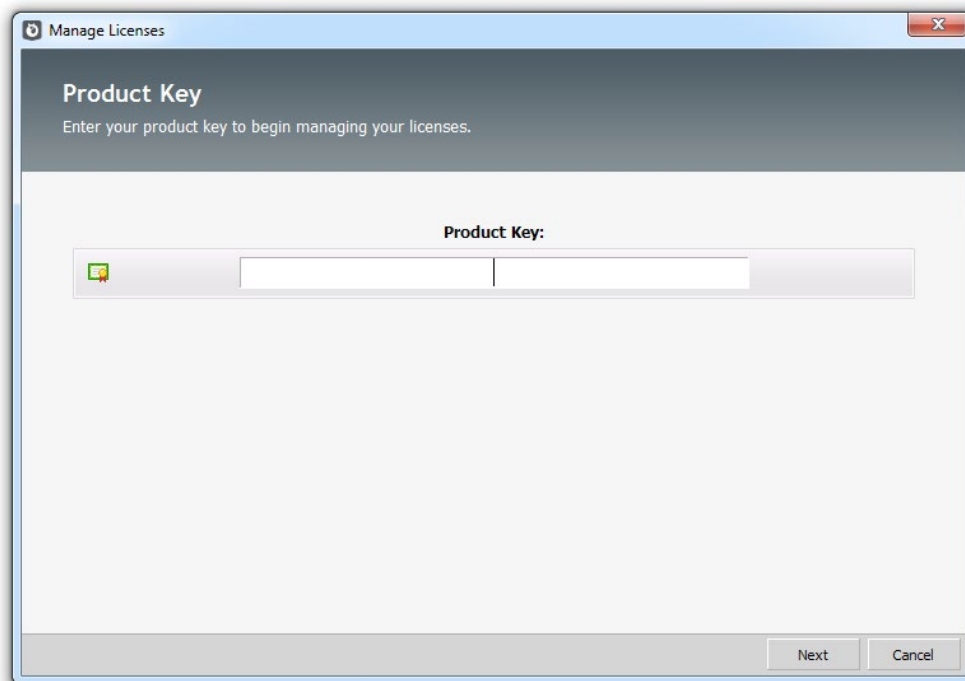
- **Username** admin
- **Password** FOXTROT
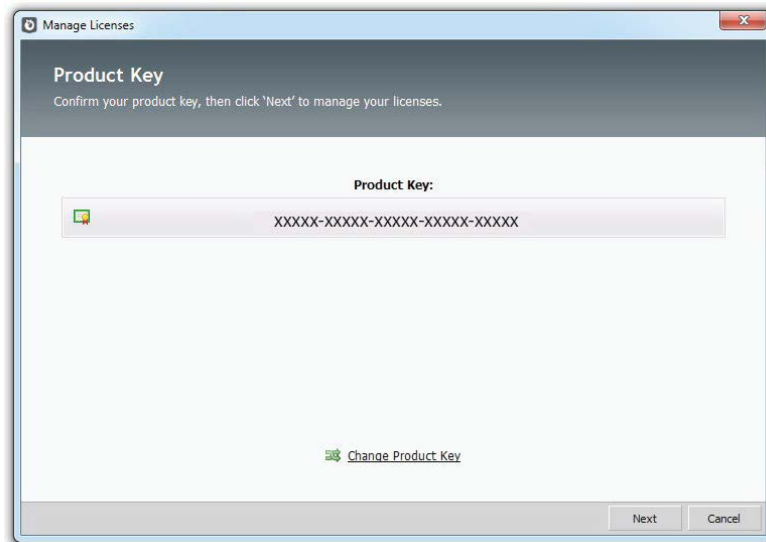Please note this password is case sensitive. Click OK to login.

3. Once the application is opened click on the **Licenses (1)** tab, then click the **Manage Licenses (2)** button.
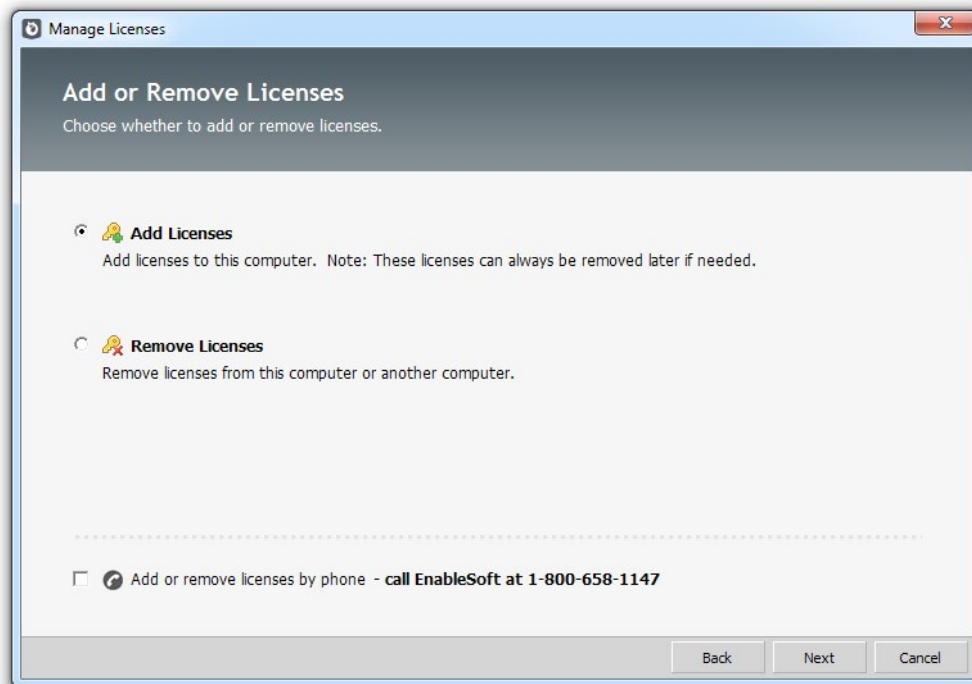

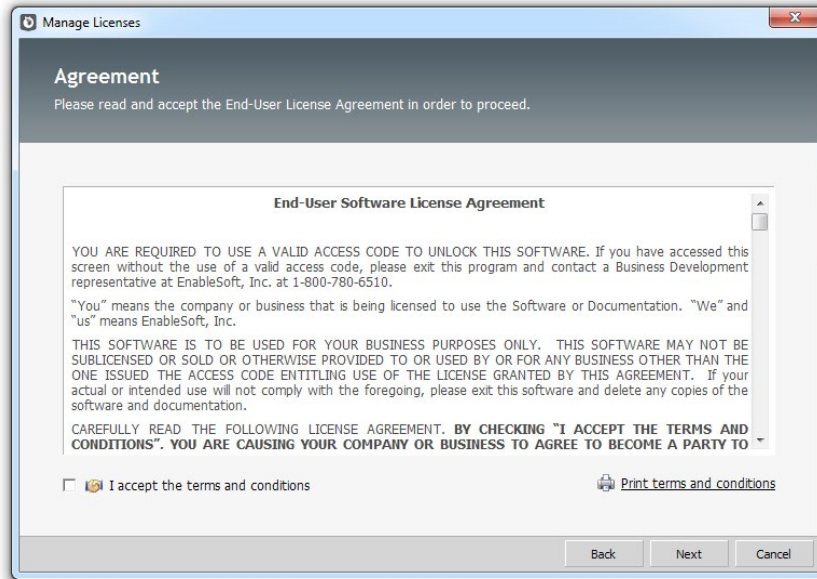4. The **Licenses Wizard** screen will appear. Enter your **Product Key** and click **Next** to continue.

5. Confirm the product key entered. If it appears incorrect, click the **Change Product Key** link and return to the previous step. If the product key appears correct, click **Next** to continue.
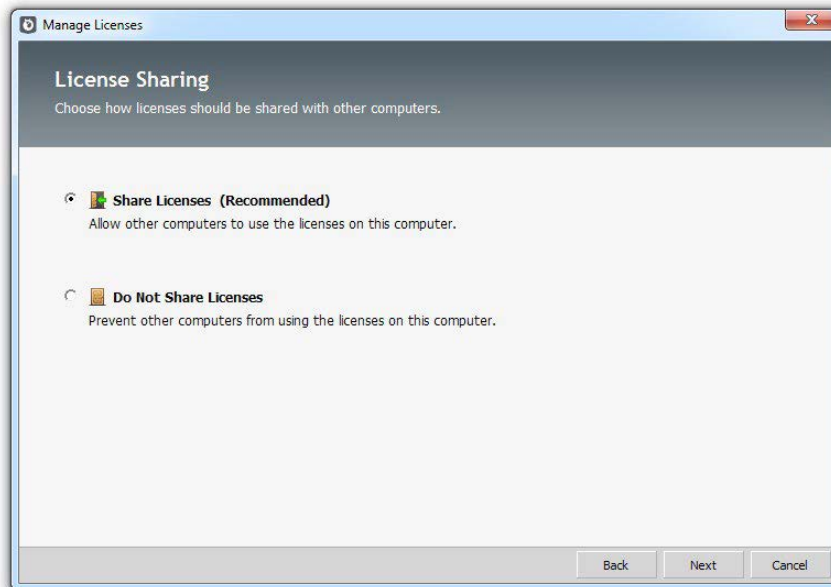

6. Select **Add Licenses** and click **Next** to continue.

7. After reading the Agreement, click the checkbox labeled **I accept the terms and conditions**. Click **Next** to continue.
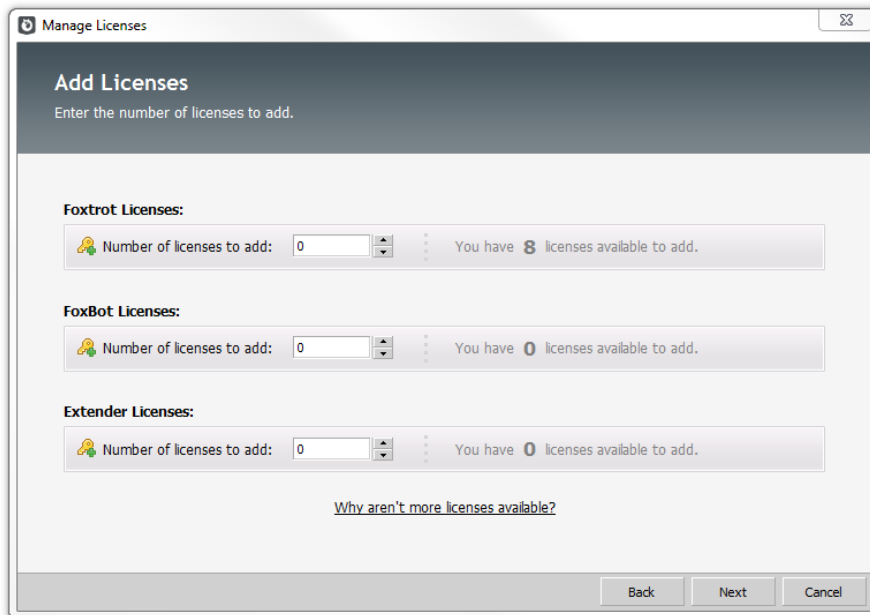

8. Select **Share Licenses** and click **Next** to continue.

9. Select a **License Sharing Path**. This path should match the folder location in which Foxtrot was installed. The **Share** name should match the **Network Path**.
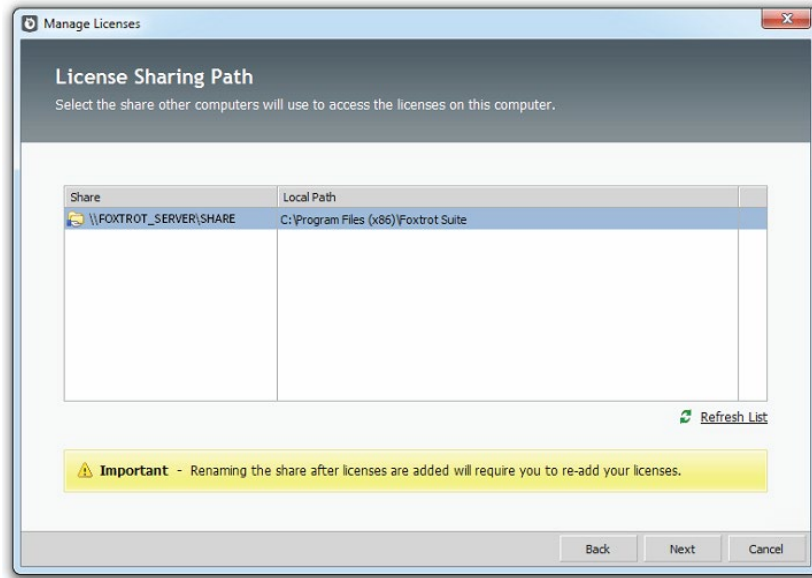
10. Input the number of licenses you wish to activate in the appropriate box (Foxtrot, FoxBot or Extender) then click **Next** to activate your license(s).

11. If successful, the **Confirmation** screen should be displayed. Click **Close** to exit the **License Wizard**.
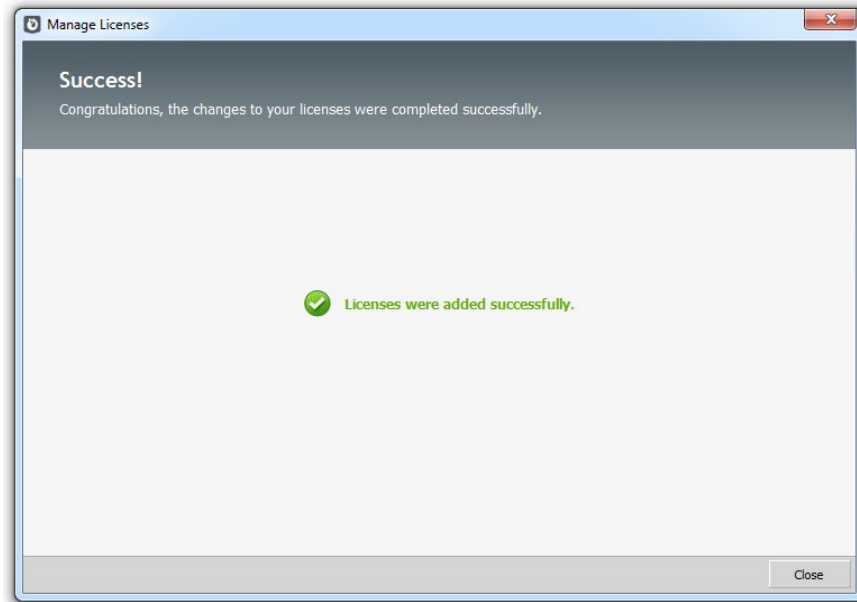
Configuring Users

Now that the licenses are installed on your **License Host**, you will need to set up your user's workstations. You will need to have the **License Path** on hand to complete this set up.

Begin by following the installation instructions outlined previously.

1. Launch the Foxtrot Administrator program.

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2. You will be required to enter login credentials. Use the following default Administrator account to login. This password can be changed at a later date, if you wish.


● **Username** admin
● **Password** FOXTROT
Please note this password is case sensitive.
Click OK to login.

3. Once Foxtrot Administrator is open, click on the **Configure (1)** tab. Enter the **License Path** (which is the Network Path that was previously configured) in all 4 fields **(2)**, **License Path**, **Security Path**, **Global Defaults Path**, and **Activity Log Path**. Click **Save Changes** in the top left of the toolbar **(3)**.
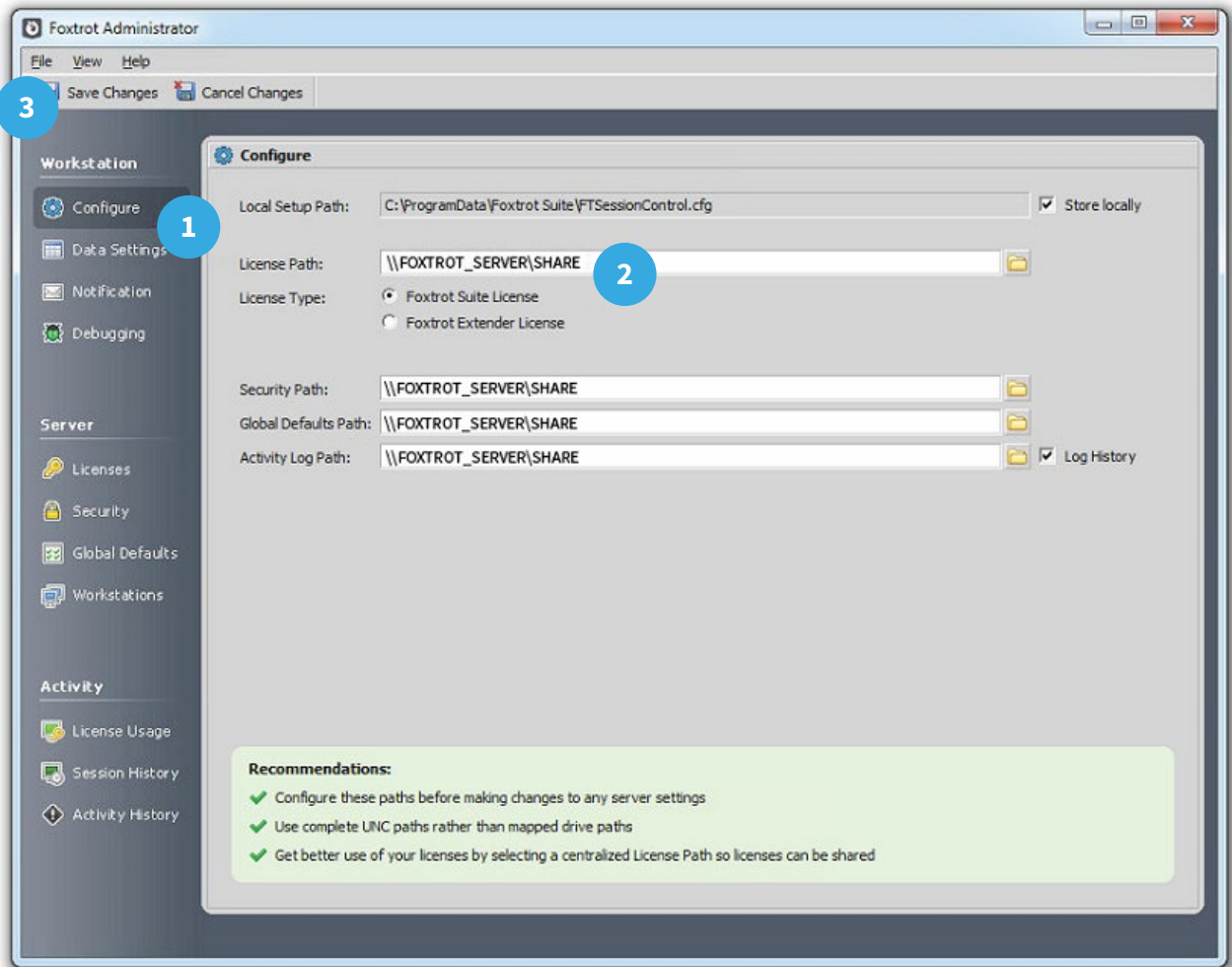
4. Navigate to the **Licenses (1)** tab and verify that the user can access the shared licenses. Also note that users will not be able to **Manage Licenses (2)** from this machine, only the **License Host** may manage licenses.
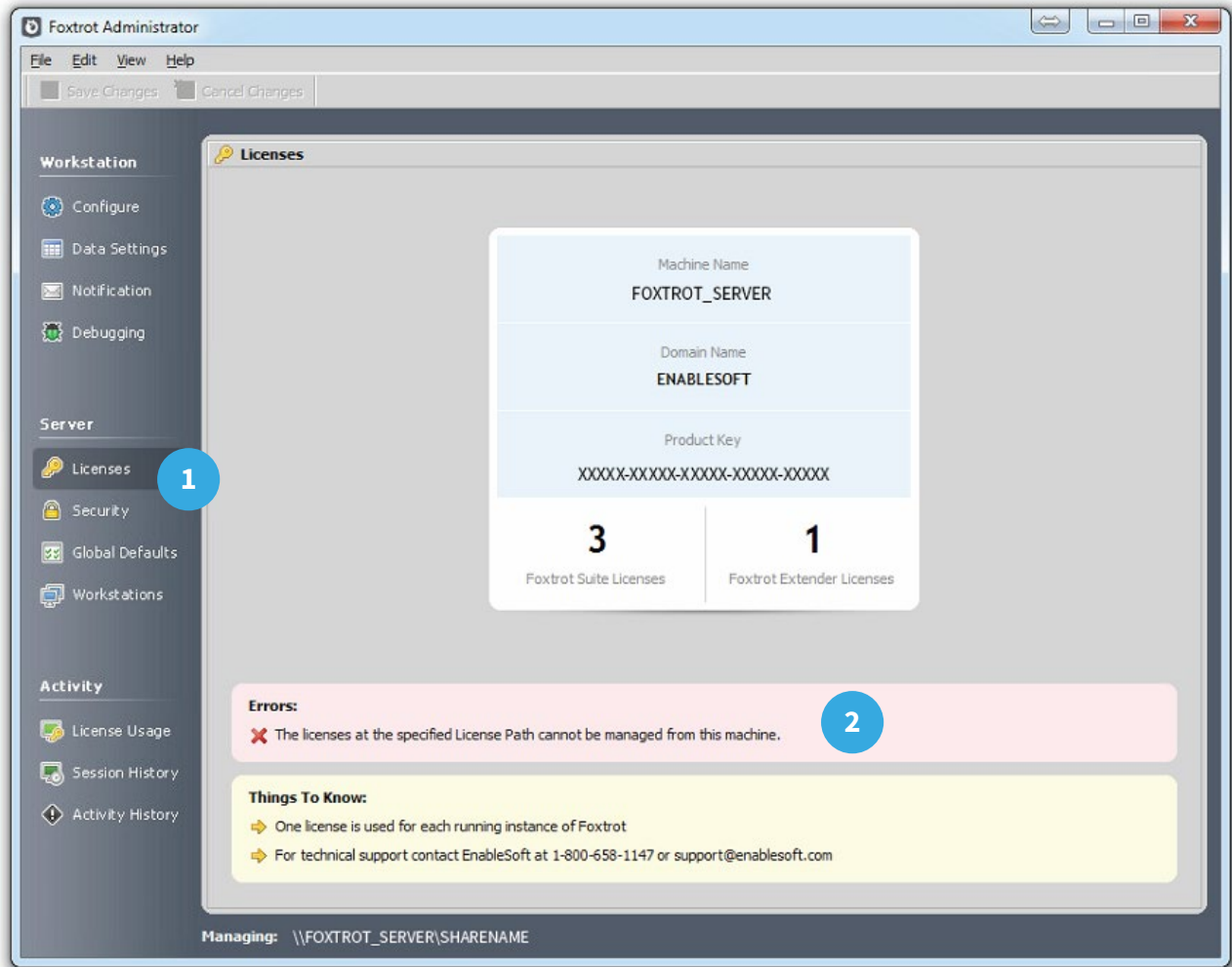
Importing Excel Documents

To import data into Foxtrot RPA from Microsoft Excel, the **Enhanced Import Wizard** must be activated. Note that this may only be enabled if Microsoft Office is installed on this machine. Activating this feature is optional, however it is **strongly** recommended.

1. Click on **Data Settings (1)** view and check the box labeled **Use Microsoft Office Automation for Enhanced Import** as well as the option labeled **Use this DSN to open Microsoft Access files (2).**
2. Select **MS Access Database** as the default DSN.
3. Click **Save Changes (3)** on the top left of the toolbar.
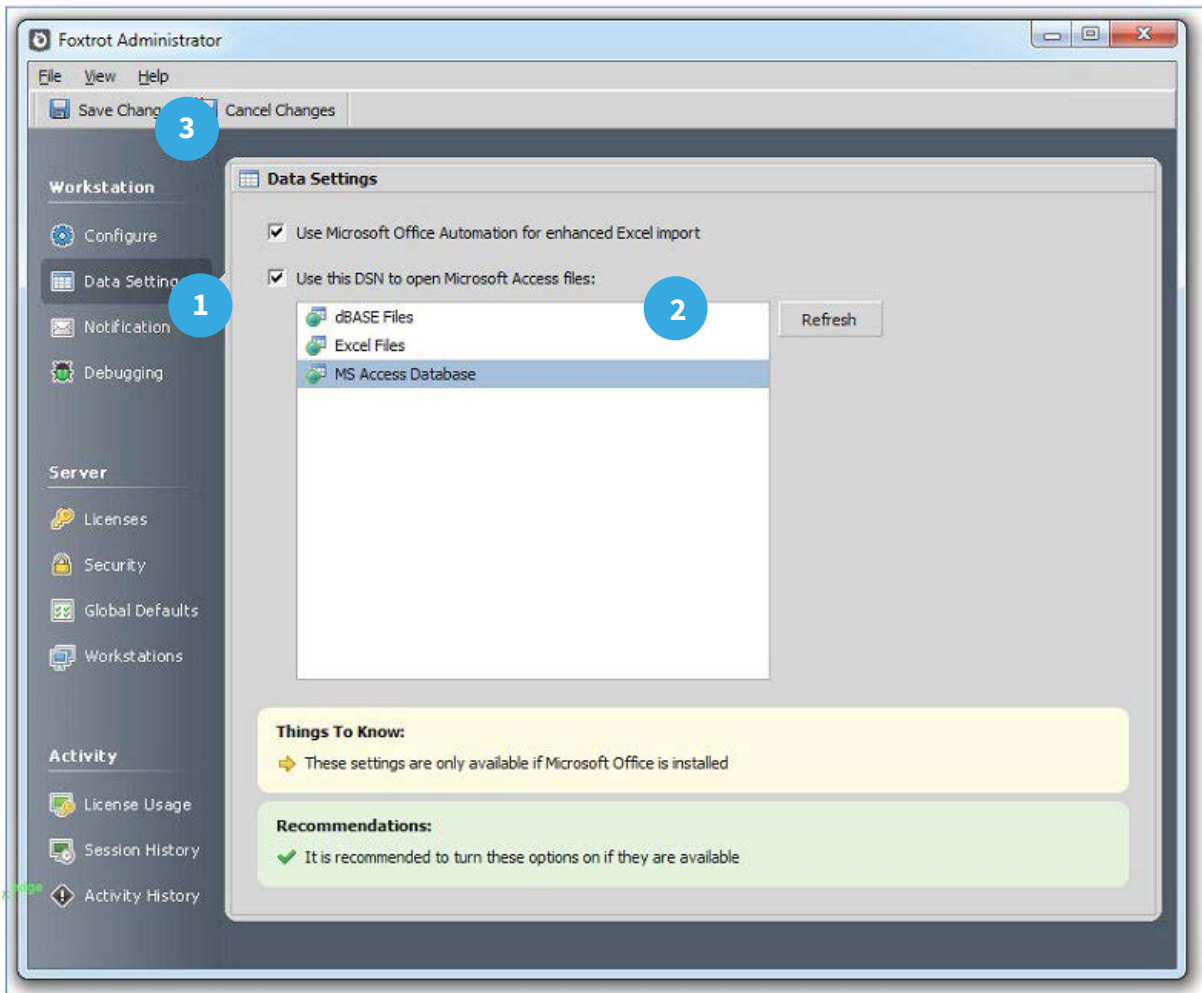
THANK YOU FOR YOUR TIME.

Contact Us

If you've still got questions after reviewing this guide, please feel free to contact our Customer Success Team.

Customer Success Team

success@enablesoft.com

800-658-1147

www.enablesoft.com