Walkthrough: Prepare the MuleSoft RPA Recorder to enrich an RPA process

In the earlier overview module, you learned that when you click the RPA Recorder button, you may be offered the chance to download the RPA Recorder from RPA Manager and then install it on your local Windows system. If the RPA Recorder is already installed, then you can open the downloaded BPMN file in the RPA Recorder and it will display in the RPA Recorder editor. This editor looks very similar to the BPMN editor you use in MuleSoft RPA Manager in the cloud. This lets you go back and forth between editing on the Windows system where the RPA Recorder runs, or back in the cloud in MuleSoft RPA Manager.
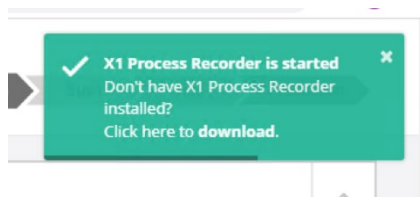
Download an existing BPMN diagram to the MuleSoft RPA Recorder on a Windows system

If you already started to sketch out the RPA process in MuleSoft RPA Manager, you can open the BPMN diagram in the RPA Recorder. To do this, follow these steps.
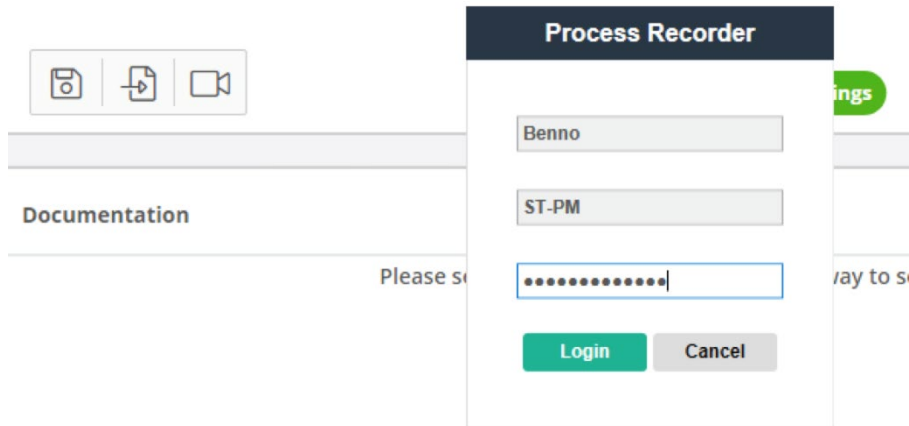
1. Open the MuleSoft RPA Recorder for a BPMN design that is being edited in MuleSoft RPA Manager.
2. Log in to MuleSoft RPA Manager from a Windows system configured in the same way as the RPA Bot(s) that will run the RPA process; log in with a user with permission to edit the RPA process design in the MuleSoft RPA Manager BPMN editor.
3. Open the RPA process in the BPMN editor.
4. In the BPMN editor, click the **Record BPMN** icon in the BPMN editor's main menu; a MuleSoft RPA Recorder Login dialog box should appear.
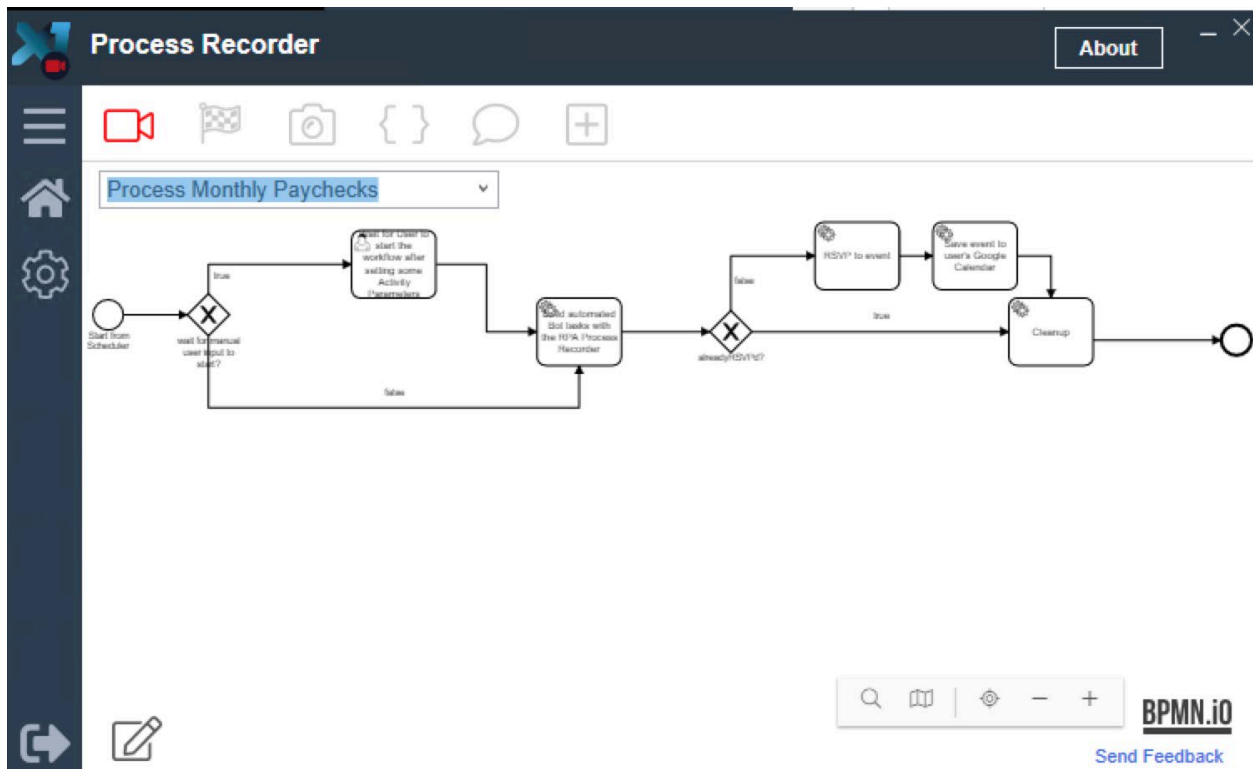

Note: A message should appear offering a link to download the MuleSoft RPA Recorder software. You only have to download and install the software once; otherwise you can ignore this message. If you have not yet installed the software, do it now before completing the next step.

5. Sign in with a user account that has permission to design the RPA process, and also has a license to run the MuleSoft Process.
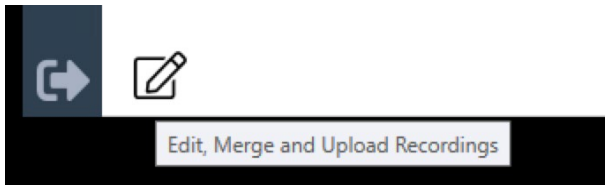

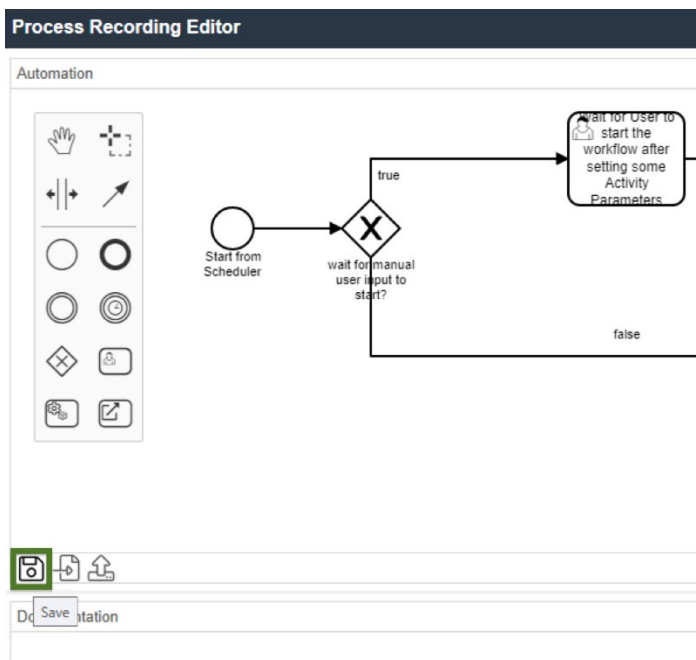The MuleSoft RPA Recorder should open on the Windows desktop.

Save the existing BPMN diagram to the Windows file system using the MuleSoft RPA Recorder editor

If you want to merge results of the MuleSoft RPA Recorder with the existing BPMN diagram, you need to save the current BPMN diagram to the local file system as a BPMN file, otherwise it will be completely replaced by the result of running the MuleSoft RPA Recorder.
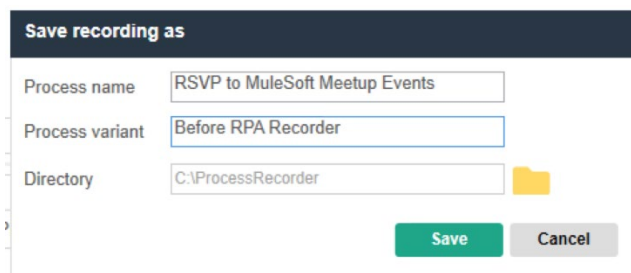
6. In the lower-left, click the **Edit, Merge, and Upload Recordings** icon; this opens the BPMN diagram in the MuleSoft RPA Recorder editor.
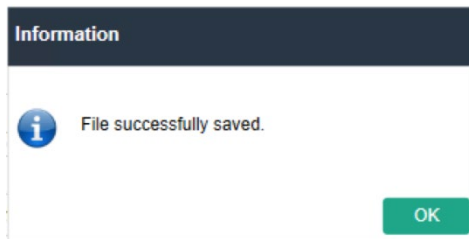

7. In the MuleSoft RPA Recorder editor main menu, click the **Save** icon.

8. In the **Save recording as** dialog box, type the process name, process variant, and directory; you should see an Information alert saying the file was successfully saved.

9. Click **OK**.

Note: The file is saved in the configured directory as a BPMN file with filename as the process name concatenated with the process variant value.
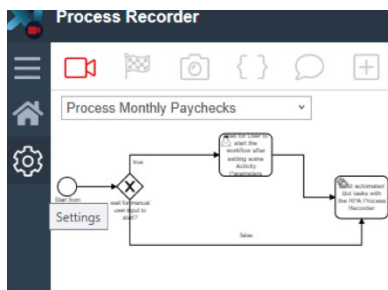
10. Close the MuleSoft RPA Recorder editor.

Now that you have backed up the BPMN design you downloaded from MuleSoft RPA Manager, you are ready to run the MuleSoft RPA Recorder.
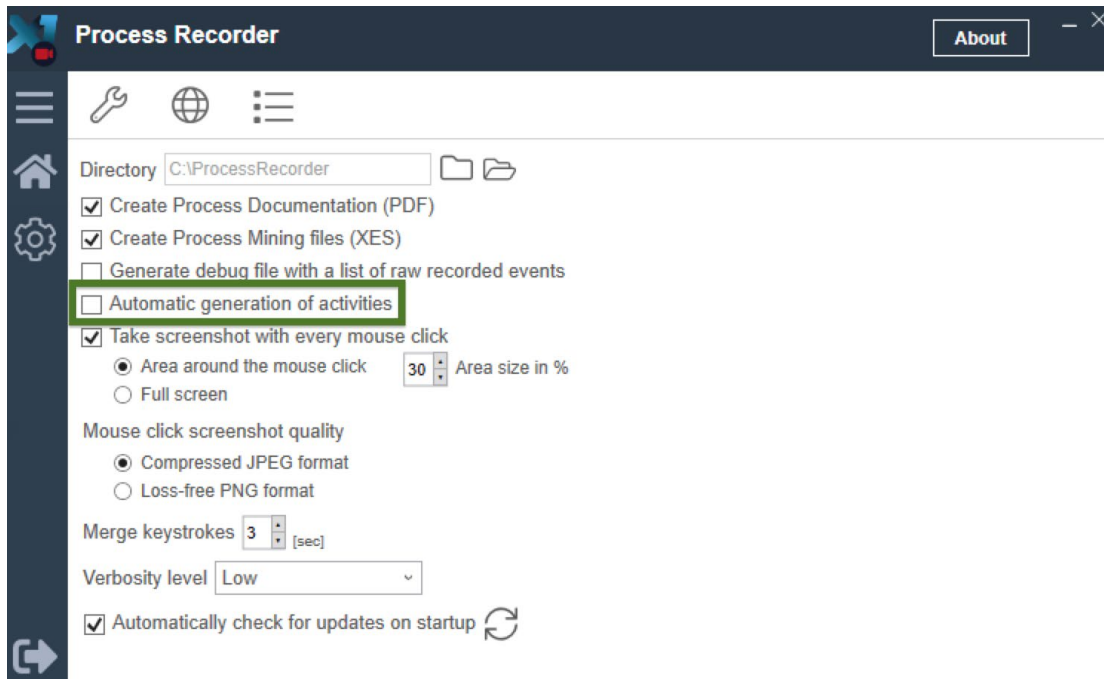
Configure the MuleSoft RPA Recorder

Before running the MuleSoft RPA Recorder, you should configure settings.

11. In the left-side menu, click the **Settings** gear icon to display the settings on the right-side canvas.
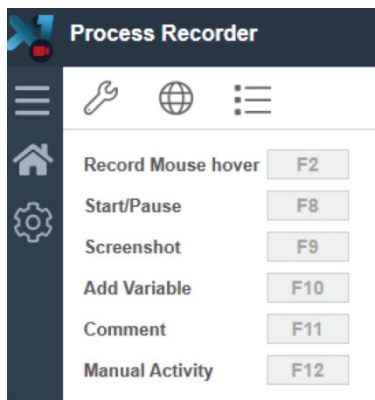
12. In the settings, uncheck the **Automatic generation of activities** checkbox.

Note: If you keep this setting checked, the result will be a lot of separate action steps that clutter the output. Because you usually replace most/all of the results of the RPA Recorder, it's better to manually group the results by manually adding tasks and other activities as you are recording. You will see how to carry out this best practice later in this walkthrough.
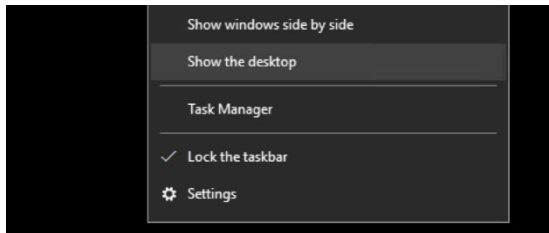
13. In the upper menu bar, click the **Hot Keys** icon.
14. Write down the keyboard shortcuts; this may help you work with the RPA Recorder with less switching between windows and other parts of the GUI.

Note: There is also a toolbar with all these commands, but as you get acquainted with the tool, these keyboard shortcuts can be much faster to use.

Prepare your Windows desktop to run the RPA Recorder

15. As discussed earlier, make sure your Windows settings match those of the Windows systems that will run the MuleSoft RPA Bots.

16. Close all windows and turn off notifications.

17. Right-click the task bar on the bottom and select **Show the desktop**.

Summary

In this unit you learned about the purpose of the MuleSoft RPA Recorder. You downloaded an RPA process from MuleSoft RPA Manager to a Windows system and then opened this RPA process in the MuleSoft RPA Recorder. You then opened this RPA process in the MuleSoft RPA Recorder editor and saved this RPA process to the local Windows system's file system so that it can be used later after the MuleSoft RPA Recorder completely replaces the BPMN diagram currently loaded in the MuleSoft RPA Recorder. You then configured the MuleSoft RPA Recorder to prepare to record user actions to carry out this RPA process.