



# RPA Agent

## What is an RPA Agent?

RPA agents are the software programs that run on desktop machines to automate tasks. They serve as the core component of the RPA platform, executing automation actions. Every machine that needs to run automation requires an RPA agent. The agent connects the Zoho RPA server to the client machine, enabling seamless communication between them. The agent provides real-time information about the machine's status, ensuring its availability for bot executions. The agent receives automation instructions from the server and executes them on the desktop machine.

## System Requirements

**Supported Operating systems:** Windows 10, Windows 11, Windows Server 2016, Windows Server 2019, or Windows Server 2022

**Minimum disk space:** 512 MB

**Minimum RAM:** 512 MB

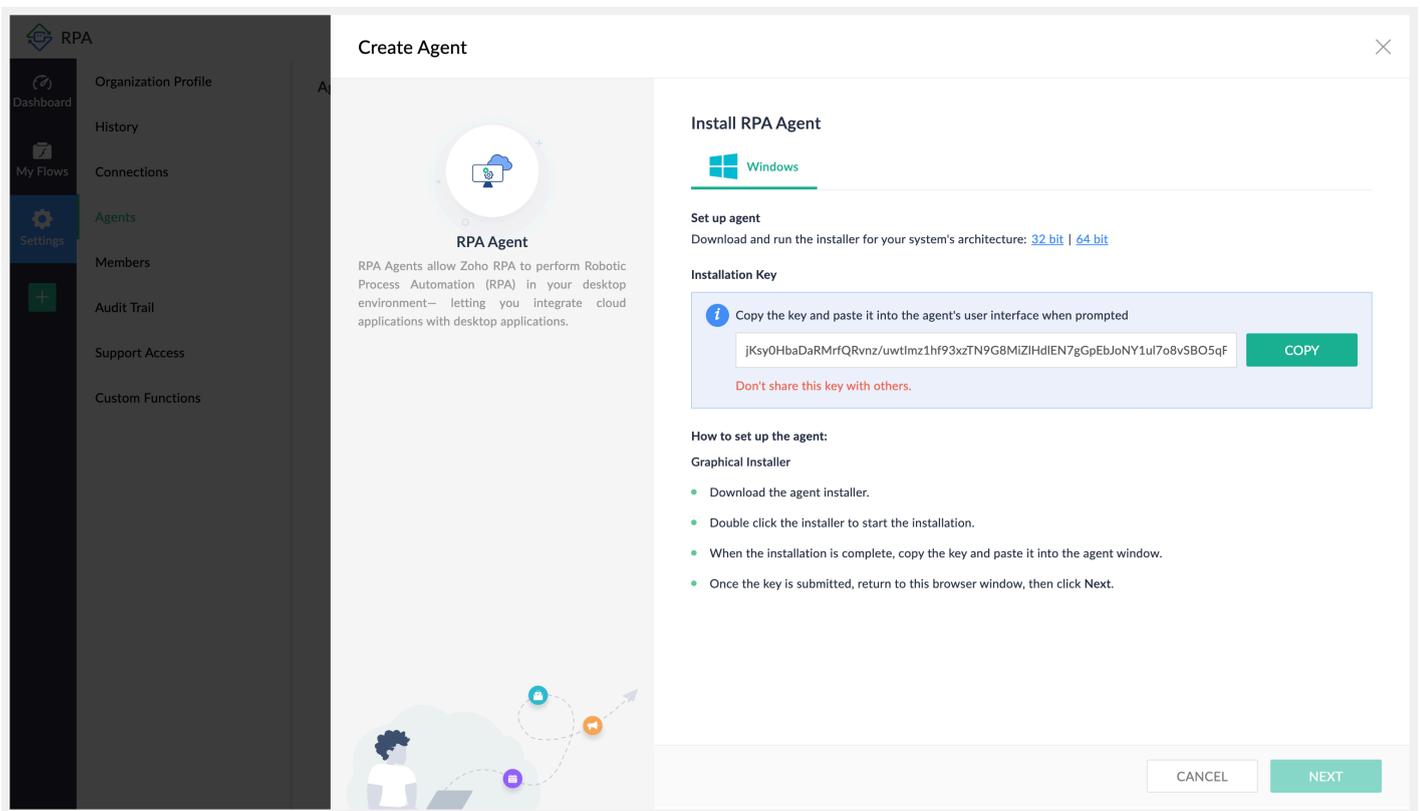
### Note:

- The RPA Agent is currently only available for **Windows** machines.
- The RPA Agent requires the **.NET Framework 4.8** or later.

## Create RPA Agent

### Install RPA Agent

1. Log in to your **Zoho RPA** account.
2. In the *Settings* section, click **Agents**, then click **Create Agent**.



3. In the screen that appears, click on the download link suitable for your Windows architecture.
4. Click **Generate Key** to generate a unique key for the new agent. In the pop-up window that appears, click **Accept** to continue.

 **Note:** The installation key can only be generated by either an admin or the owner of the organization. Once the key is generated, it will be available for the other users in the organization.

5. Follow the on-screen instructions and run the agent.
6. Once you've successfully set up the agent, click **Next**.
7. Click **Done**.

## Register Agent

After installing the agent, you will be prompted to register it.

Zoho RPA Agent - Register

Agent name

Agent key

Copy and paste the agent installation key from your Zoho RPA account.

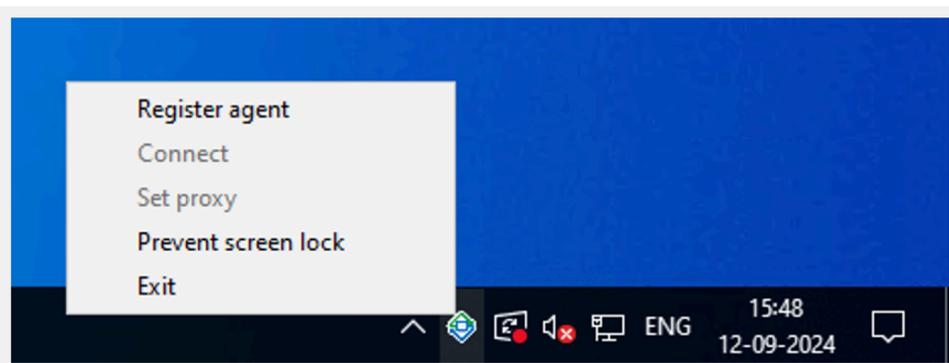
Update agent automatically

Set proxy Register agent

Please switch to the browser after registering the agent

1. Enter the agent name in the *Agent name* field.
2. Enter the agent key in the *Agent key* field.
3. Click **Register Agent**.
4. Switch to the browser window to confirm that your agent is created and registered.

To register an agent at a later time, or to register an agent that was unregistered:



1. Right-click the **RPA Agent** icon in the system tray and select **Register Agent**.
2. Enter the agent name and agent key in the window.
3. Click **Register Agent**.

**Note:** You can only register an agent that has not been registered. If you need to register an agent that has already been registered, you will first need to unregister.

## Configure Proxy Settings

To set proxy settings for the RPA agent on your client machine:

Zoho RPA Agent - Proxy Configuration

Server \*

Port \*

Username

Password

Cancel Save

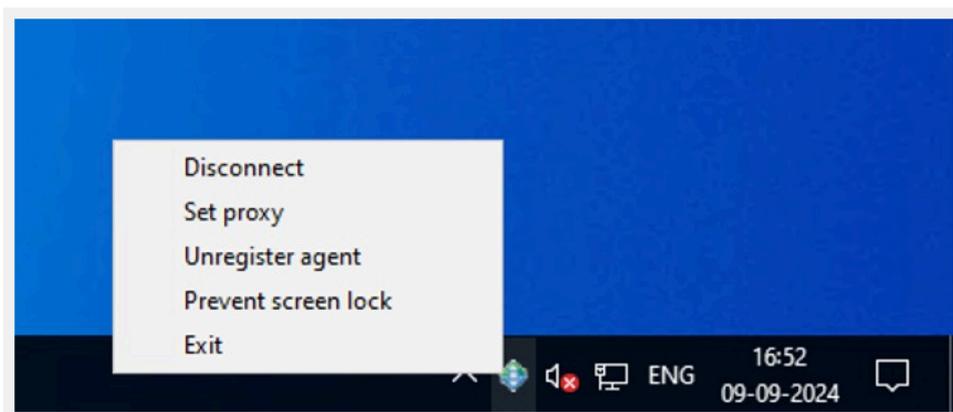
1. Install the RPA agent.
2. On the *Register Window* screen, click the **Set Proxy** button.
3. You will be redirected to the *Proxy Configuration* screen.
4. Enter the following information:
  - o Server
  - o Port
  - o Username (optional)
  - o Password (optional)
5. Click **Save**.

To configure proxy settings for a previously registered agent:

1. Right-click on the RPA system tray icon and select **Set proxy**. You will be redirected to the *Proxy Configuration* window screen.
2. Enter the proxy server settings and click **Set proxy**.

## Unregister RPA Agent

To unregister an agent:



1. Right-click the RPA Agent icon in the system tray and select **Unregister Agent**.
2. Click **Unregister** to proceed.

 **Note:** Unregistering an agent will abort all running RPA processes and exit the agent. You will need to manually start the agent again, if required.

## Enable Screen Lock

By default, the RPA agent follows your Windows machine's screen lock settings. If your machine is set to automatically lock the screen at a specific time, the screen will lock as scheduled. The agent will not change this setting.

Here's how RPA automation processes will be executed when screen lock is enabled:

**No active executions:** The system will lock and eventually enter sleep mode.

**Active UI interactions:** The system will *not* lock. The RPA agent remains active and connected to the RPA server. Once UI interactions stop, the system will lock and eventually enter sleep mode, and the agent will disconnect. Unfinished executions may result in failure.

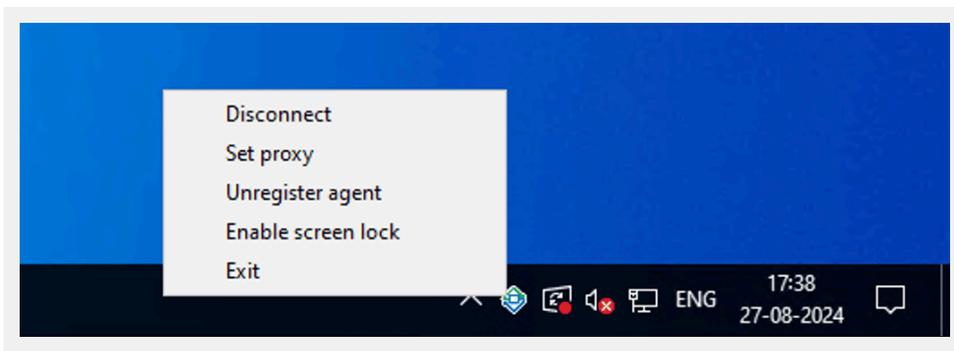
**Screen locked:** The following UI-based actions will not work:

Category	Unsupported actions
Windows Actions	Type into Send hot keys
Windows General	Open file dialog Save file dialog
Web Automation	Type into Send hot keys

Other actions like MS Excel file and folder actions will work until the system enters sleep mode, causing the agent to disconnect.

To enable this action:

- Right-click the RPA Agent icon in the system tray and select **Enable screen lock**.



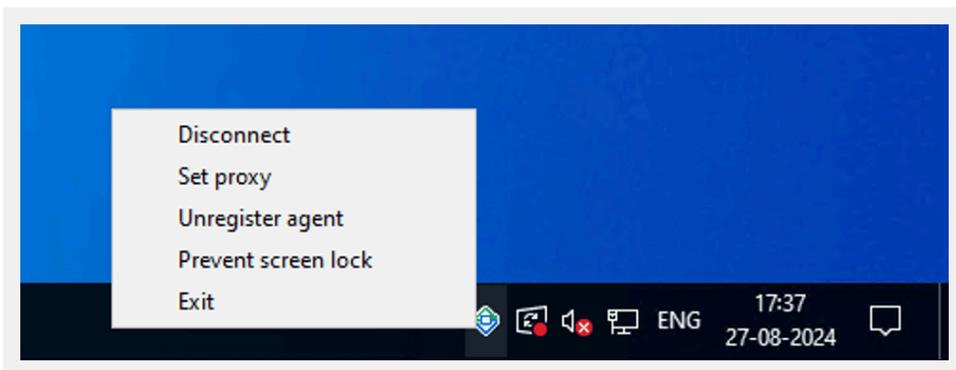
 Note: This option is only available if you've previously switched to prevent screen lock and want to return to the default setting.

## Prevent Screen Lock

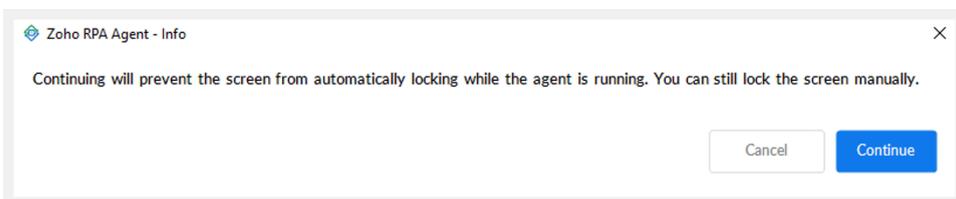
Using this option, the agent will override your Windows settings and prevent the screen from locking unless you manually lock it.

To use this option:

- Right-click the RPA system tray icon and select **Prevent screen lock**.



- Click **Continue** on the prompt.



When screen lock is prevented, all RPA executions will work as expected.

## Connect, Disconnect and Exit RPA Agent

You can connect, disconnect, and exit the RPA Agent from the system tray.

- **To connect the agent to the RPA server:** Right-click the agent icon and select **Connect**.
- **To disconnect the agent from the server:** Right-click the agent icon and select **Disconnect**.

- **To exit the RPA process:** Right-click the agent icon and select **Exit**.

## Delete RPA Agent

To delete an agent:

Agent Name	Last updated on	Enable / Disable	OS	Status	Action
Main Office Agent 1 <a href="#">↗</a> RPA agent	Apr 04, 2023 16:09	<input type="checkbox"/>	Windows	Inactive ⓘ	PING VIEW DETAILS 
Hub Office Agent2 RPA agent	Sep 18, 2023 12:42	<input type="checkbox"/>	Windows	Inactive ⓘ	PING VIEW DETAILS

1. Log in to your Zoho RPA account.
2. Click **Settings**, then click Agents.
3. Hover over the agent you want to delete, then click the bin icon to delete the agent.

If the agent is used in any flow, you will be prompted to remove it from the flow before you can delete it.

## Manage your RPA Agents

Navigate to the **Settings > Agents** page to manage all the agents in your organization.

This page displays a list of all installed agents, along with their details :

- **Agent Name:** The name of the RPA agent
- **Last Updated On:** The date and time the agent was last updated
- **Enable/Disable:** Toggle to enable or disable the agent for use in flows
- **Host:** The hostname and operating system of the agent
- **Status:** The status of the RPA agent (active or inactive)

You can perform the following actions on each agent:

- **Ping:** Check the agent's connectivity to the RPA server
- **View Details:** Access the following information:

### **Agent Details:**

- **Agent Name:** The name of the agent
- **Installation Key:** Use this installation key if you have uninstalled the agent on the agent machine.
- **Agent Version:** The version of the agent installed. Indicates whether it's the latest version or if an update is available.
- **Auto Update:** Enable or disable auto-updates for the agent. When enabled, the agent will update automatically whenever a new update is available.

- **Created On:** The date and time the agent was created
- **Created By:** The user who created the agent

## Frequently asked questions

### 1. What is an RPA Agent?

An RPA agent is a software program that you install on your computer to run RPA workflows. It acts as a bridge between your computer and the Zoho RPA server, allowing the server to send commands to your computer and execute workflows on it.

### 2. When should you install an RPA Agent?

All RPA flows require an RPA agent to run. When creating an RPA flow, you must configure an agent to execute the automation.

### 3. What are the system requirements for an RPA agent?

**Supported Operating systems:** Windows 10, Windows 11, Windows Server 2016, Windows Server 2019, or Windows Server 2022

**Minimum disk space:** 512 MB

**Minimum RAM:** 512 MB

### 4. How do I install the RPA Agent?

- Navigate to the **Settings** page on your Zoho RPA account.
- Click **Agents** then, click **Create Agent**.
- From the *Install your agent* screen, you can download the agent installation file for your system's architecture.
- Run the agent installation file on your computer.
- Follow the on-screen instructions to complete the installation process.

### 5. Does RPA Agent have to be installed on all machines where the automation need to be executed?

Yes.

### 6. Do I need RPA Agent to be installed for Web Automation?

Yes. All RPA flows will require an RPA agent to run the flow. Web browser actions will require a browser extension to be installed additionally to record the tasks.

### 7. Can I undo deleting my agent from Zoho RPA's settings page?

No, you cannot undo the deletion. However, you can create a new agent. Reinstalling the agent on the machine is not necessary. Right-click on the agent's desktop tray icon, choose "UnRegister Agent. Then start the agent and register your agent.

### 8. What happens if my system crashes and is recovered later? Will it affect my flows?

If you're able to recover your system after the crash, and the agent's files are intact in your system, you can

start the agent again. If you're unable to recover your system, you'll just need to install the agent again, using the re-installation key available from Settings > Agents > View Details. You won't have to reconfigure existing flows if you have successfully reinstalled the agent.

However, note that any RPA flow using that agent will fail and will not work until the agent is active and is connected.

#### 9. How do I manage all the agents I have created?

You can manage your agents by navigating to Settings > Agents. Here, you can perform actions such as rename, enable auto update, delete, and enable/disable.

#### 10. Do we have a limit on the number of agents I can install?

Yes, we do have a limit. Please write to us at [support@zohorpa.com](mailto:support@zohorpa.com) to help us understand your requirement and work on the limits.

#### 11. I'm getting an "Agent Busy" error, even though I don't see the agent performing any operations. What should I do?

This error typically occurs when the agent is currently executing a flow or performing an update and you attempt to configure an action using the same agent. To resolve this issue, try the following:

- **Wait for a few minutes and try again.** Once the agent has finished its current task, it should be available for you to configure new actions.
- **Exit the agent and restart it.** This will completely refresh the agent and clear any pending tasks allowing you to configure actions.

#### 12. How can I retrieve the agent logs to contact support for further debugging assistance in case of issues?

C:/Users/<Windows-User>/AppData/Roaming/Zoho/RPAAgent/logs/RPAAgentLog0.txt

#### 13. How do I manually update the RPA Agent?

- **Double click** on the RPA Agent desktop tray icon.
- If a new version is available, you will see a message "New Version of agent is available. Update now."
- Click **Update now** to update your agent to the latest version.

#### 14. How do I uninstall the RPA Agent?

- Open the Windows **Control Panel**.
- Click **Programs and Features** or **Uninstall a program**.
- In the list of applications, search for Zoho RPA.
- Right-click on Zoho RPA and select **Uninstall**.
- Follow the on-screen instructions to complete the uninstallation process.

## 15. How do I resolve connectivity issues with my RPA agent?

If you are having connectivity issues with your RPA agent, please check the following:

- Make sure that your computer is connected to the internet.
- Check your proxy server settings to make sure that the firewall on your computer is not blocking the RPA agent from connecting to the server.
- Exit and restart your RPA Agent.
- If you are still having problems, contact Zoho RPA support at [support@zohorpa.com](mailto:support@zohorpa.com)