# FORTRA

# Automate Desktop 24.1.0 Installation Guide

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# **Before You Begin**

**NOTE**: Automate Desktop was formerly called Automate.

Read this section before you install, update, or upgrade Automate Desktop.

## License key

A license key is not required during the installation, update, or upgrade process. You can enter a license key in the **Task Administrator** under **Options > License**. For license key information or assistance, contact keys@fortra.com.

## System requirements

To install/update/upgrade and run Automate Desktop, make sure your computer has the following hardware and software requirements:

Hardware component	Minimum requirements	Recommended requirements
Processor	2 GHz 32-bit or 64-bit processor	3 GHz, multi-core 32-bit or 64-bit processor (or higher)
Memory	4 GB RAM	6 GB RAM (or higher)
Hard Drive	5 GB available hard disk space	5 GB available hard disk space (or higher)
Display	1280x1024 resolution, 32 MB video RAM	1280x1024 resolution, 32 MB video RAM (or higher)

### Hardware

## **Operating systems**

- Windows 11
- Windows Server 2022
- Windows Server 2019
- Windows Server 2016
- Windows 10

- Windows Server 2012 R2
- Windows Server 2012
- Windows Server 2008 R2 SP1

### Additional software requirements

- Internet connection for required updates.
- .NET Framework 4.8 (included).

**NOTE**: For a list of Microsoft Windows versions that are compatible with .NET Framework 4.8, see . NET Framework System Requirements at <u>https://docs.microsoft.com/en-us/dotnet/framework/get-started/system-requirements</u> for more information.

- Microsoft Visual C++ Redistributable for Visual Studio 2015, 2017, and 2019.
- Windows Installer 4.5 (included).
- Third-party applications you want to integrate with Automate Desktop 2024 (for example, Microsoft Excel).

# Installing Automate Desktop

You can install Automate Desktop using the Windows installer file or by way of simple command-line parameters and properties (see <u>Command-line installation on page 4</u> for more information).

# Windows installer file installation

#### **IMPORTANT:**

Before installing Automate Desktop, do the following:

- Confirm your version of Microsoft Windows is compatible with .NET Framework 4.8. See . NET Framework System Requirements at <u>https://docs.microsoft.com/en-us/dotnet/framework/get-started/system-requirements</u> for more information.
- Confirm you have full administrator privileges.
- Temporarily disable any antivirus applications. Some antivirus applications may block the installation of third-party applications, such as Automate Desktop.

To install Automate Desktop using the Windows installer file, do the following:

- 1. Download the **Automate Desktop 2024 Windows installer** file for your version of Windows from the Fortra Support Portal at <u>https://support.fortra.com/</u>.
- 2. Right-click on the installer file, and then select **Run as administrator** to open the **InstallShield Wizard**.
- 3. Proceed through the wizard until you reach the **Installation Details** page, and then select one of the following options:
  - a. **Full Automate Desktop installation** (default) Installs all of the components included with the full version of Automate Desktop (that is, the Automate Desktop Task Service and all user interfaces such as the Task Administrator and Task Builder).
  - b. **Automate Desktop Runtime installation** Installs only the Automate Desktop Task Service which performs tasks as directed by developers. This option does not include user interfaces.
- 4. Select Next.
- 5. If you selected **Automate Desktop Runtime installation** in step 3, enter a remote access password for the Runtime component. For more information on remote access, see <u>Remote Administration</u> in the Automate Desktop User Guide on the Fortra Support Portal at <u>https://support.fortra.com/</u>.

- 6. Select Install.
- 7. When the installation process is complete, select **Finish**.
- 8. Open **Automate Desktop 2024 Task Administrator** to begin configuring Automate Desktop.

## Command-line installation

You can silently install Automate Desktop with simple command-line parameters using the Windows Installer executable. This provides network administrators or IT personnel the ability to easily conduct mass deployments and simplified automated installations.

For InstallShield parameters not covered in this guide, see <u>Setup.exe and Update.exe</u> <u>Command-Line Parameters</u>.

### **Required items**

To install Automate Desktop using command-lines, you will need the following:

- The Automate Desktop Windows installer file (automate\_desktop\_2024\_x64.exe or automate\_desktop\_2024\_x86.exe).
- Your Automate Desktop license key.

### Installation properties

Use the following properties during a command-line installation of Automate Desktop. Separate each property and its value with an equal sign (=) and enter them and any switch parameters after /v'', but before the ending quotation mark ("). The property values are not case sensitive, but you must enter all property names in uppercase format (see the Example column in the table below):

Property name	Description	Example
LICENSEKEY	The Automate Desktop license key used to register the software. If not provided, Automate Desktop will install as a 30-day evaluation version.	LICENSEKEY=12345689012345

Property name	Description	Example
STARTSERVICE	Starts or stops the Automate Desktop 2024 service.	• STARTSERVICE=1 - Starts the Automate Desktop 2024 service.
		• STARTSERVICE=0 - Stops the Automate Desktop 2024 service.

### Installing Automate Desktop using command-lines

### Default installation path

To silently install Automate Desktop using the default installation path (64-bit - C:\Program Files\Automate Desktop 2024 or 32-bit - C:\Program Files (x86)\Automate Desktop 2024), use the following command-lines:

- 64-bit
  - Licensed

```
automate_desktop_2024_x64.exe /s /v"/qn LICENSEKEY=<your
Automate Desktop license key>"
```

• 30-day evaluation (omit the LICENSEKEY property)

automate desktop 2024 x64.exe /s /v"/qn"

- 32-bit
  - Licensed

```
automate_desktop_2024_x86.exe /s /v"/qn LICENSEKEY=<your
Automate Desktop license key>"
```

• 30-day evaluation (omit the LICENSEKEY property)

automate desktop 2024 x86.exe /s /v"/qn"

After entering any of the above command-lines, the installation then proceeds silently in the background. The install is complete when the Automate Desktop 2024 service starts, indicated by the 🙆 icon in the Windows system tray near the system clock.

#### Specified installation path

To silently install Automate Desktop 2024 to a specified path, use the following commandlines:

- 64-bit
  - Licensed

```
automate_desktop_2024_x64.exe /s /v"/qn INSTALLDIR=\"<your
specified path>\" LICENSEKEY=<your Automate Desktop license
key>\"
```

• 30-day evaluation (omit the LICENSEKEY property)

```
automate_desktop_2024_x64.exe /s /v"/qn INSTALLDIR=\"<your
specified path>\""
```

- 32-bit
  - Licensed

```
automate_desktop_2024_x86.exe /s /v"/qn INSTALLDIR=\"<your
specified path>\" LICENSEKEY=<your Automate Desktop license
key>"
```

30-day evaluation (omit the LICENSEKEY property)

```
automate_desktop_2024_x86.exe /s /v"/qn INSTALLDIR=\"<your
specified path>\""
```

After entering any of the above command-lines, the installation then proceeds silently in the background. The install is complete when the Automate Desktop 2024 service starts, indicated by the 🙆 icon in the Windows system tray near the system clock.

#### Starting/stopping the Automate Desktop 2024 service

To start or stop the Automate Desktop 2024 service during installation, use the STARTSERVICE property. For example, to start or stop the service using the 64-bit version of the Windows installer file, use the following command-lines:

• Start the service

automate desktop 2024 x64.exe /v"/qn STARTSERVICE=1"

• Stop the service

```
automate desktop 2024 x64.exe /v"/qn STARTSERVICE=0"
```

#### Creating an install log

To create a log file to trace the progress of the installation, use the /1\*v parameter and specify the level of logging. For example, to create a verbose log for the 64-bit version of the Windows installer file with a license key in the default installation location, use the following command-line:

```
automate_desktop_2024_x64.exe /s /v"/qn /LICENSEKEY=<your
Automate Desktop license key> /l*v c:\amdinstall.log"
```

# Updating/Upgrading Automate Desktop

To update or upgrade to Automate Desktop 2024 from an earlier version, create a backup of your Automate Desktop data, uninstall your current version, install Automate Desktop 2024, and then restore your backup data.

**NOTE**: Automate Desktop 2024 does not support upgrades by way of command-lines. You must uninstall your current version of Automate Desktop, and then install Automate Desktop2024. See <u>Command-line installation on page 4</u> for more information.

#### IMPORTANT:

Before updating or upgrading Automate Desktop, do the following:

- Confirm your version of Microsoft Windows is compatible with .NET Framework 4.8. See . NET Framework System Requirements at <u>https://docs.microsoft.com/en-us/dotnet/framework/get-started/system-</u> requirements for more information.
- Confirm you have full administrator privileges.
- Temporarily disable any antivirus applications. Some antivirus applications may block the installation of third-party applications, such as Automate Desktop.

# Backing up Automate Desktop

Before updating or upgrading, back up your Automate Desktop data by doing the following:

- 1. Open Automate Desktop 2024 Task Administrator.
- 2. Select Options.
- 3. Select System Settings.
- 4. Double-click **Backup & Restore**.
- 5. On the **Backup & Restore** window, do the following:
  - a. Select **Backup**.
  - b. In **Archive location** box, enter the path and file name of where to save the backup .ama file, or use the predefined settings.
  - c. Select Backup tasks and triggers.

- d. Select Include constants and system preferences.
- e. Select Backup.
- 6. If a dialog appears stating the backup .ama file already exists, select **Yes** to overwrite it, or **No** to cancel the message dialog to select a new path and/or filename.

## Updating Automate Desktop

After backing up your Automate Desktop data, do the following to update or upgrade to Automate Desktop 2024:

- 1. Close Automate Desktop 2024 Task Administrator.
- 2. Press the **Windows logo+R** keys on your keyboard to open the **Run** window.
- 3. Enter **services.msc**, and then select **OK**.
- 4. From the Services (Local) list, select Automate Desktop 2024.
- 5. From the **Action** menu, select **Stop**.
- 6. Close the **Services** window.
- 7. Open the Control Panel in Windows, and then uninstall Automate Desktop 2024.
- If you receive the "The following applications should be closed before continuing the installation" dialog when you attempt to uninstall either version of Automate Desktop, select Automatically close applications and attempt to restart them after setup is complete and then select OK.
- 9. Download the **Automate Desktop 2024 Windows installer** file for your version of Windows from the Fortra Support Portal at <u>https://support.fortra.com/</u>.
- 10. Right-click on the installer file, and then select **Run as administrator** to open the **InstallShield Wizard**.
- 11. Proceed through the wizard until you reach the **Installation Details** page, and then select one of the following options:
  - a. **Full Automate Desktop installation** (default) Installs all of the components included with the full version of Automate Desktop (that is, the Automate Desktop Task Service and all user interfaces such as the Task Administrator and Task Builder).
  - b. **Automate Desktop Runtime installation** Installs only the Automate Desktop Task Service which performs tasks as directed by developers. This option does not include user interfaces.
- 12. Select Next.
- 13. If you selected **Automate Desktop Runtime installation** in step 11, enter a remote access password for the Runtime component. For more information on remote

access, see <u>Remote Administration</u> in the Automate Desktop User Guide on the Fortra Support Portal at <u>https://support.fortra.com/</u>.

- 14. Select Install.
- 15. When the installation process is complete, select **Finish**.
- 16. Open the Automate Desktop 2024 Task Administrator.
- 17. On the **Managed Tasks** window, verify all custom tasks are available. If any of your tasks are missing, see **Restoring Automate Desktop data from a backup on page 10**.

## Restoring Automate Desktop data from a backup

If your any of your tasks are missing after performing an update or upgrade, you will need to restore the backup . ama file you created in step 5 of <u>Backing up Automate Desktop on page</u> <u>8</u>.

- 1. From the Task Administrator, select Options.
- 2. Select System Settings.
- 3. Double-click Backup & Restore.
- 4. On the **Backup & Restore** window, do the following:
  - a. Select Restore.
  - b. For Archive location, select the folder used to create the backup .ama file, and then select the .ama backup file.
  - c. Select Restore tasks and triggers (overwrites current tasks).
  - d. Select Restore constants and system preferences.
  - e. Select Restore.
- 5. On the Restore Warning dialog, select Yes.
- 6. Once the restore process is complete, select **Tasks**.
- 7. On the **Managed Tasks** window, verify all custom tasks are restored. If any of your tasks are still missing, contact Technical Support at <u>https://support.fortra.com/</u>.

**NOTE**: For more information on backing up and restoring your Automate Desktop data, see <u>Backup & Restore</u> in the Automate Desktop User Guide on the Fortra Support Portal at <u>https://support.fortra.com/</u>.

# After You Are Done

Congratulations! Automate Desktop is now installed. Read the following for additional information and your next steps.

## Next steps

- Re-enable any antivirus applications you disabled before you started the installation, update, or upgrade process.
- For additional resources, or to contact Technical Support, visit the Fortra Support Portal at <u>https://support.fortra.com/</u>.