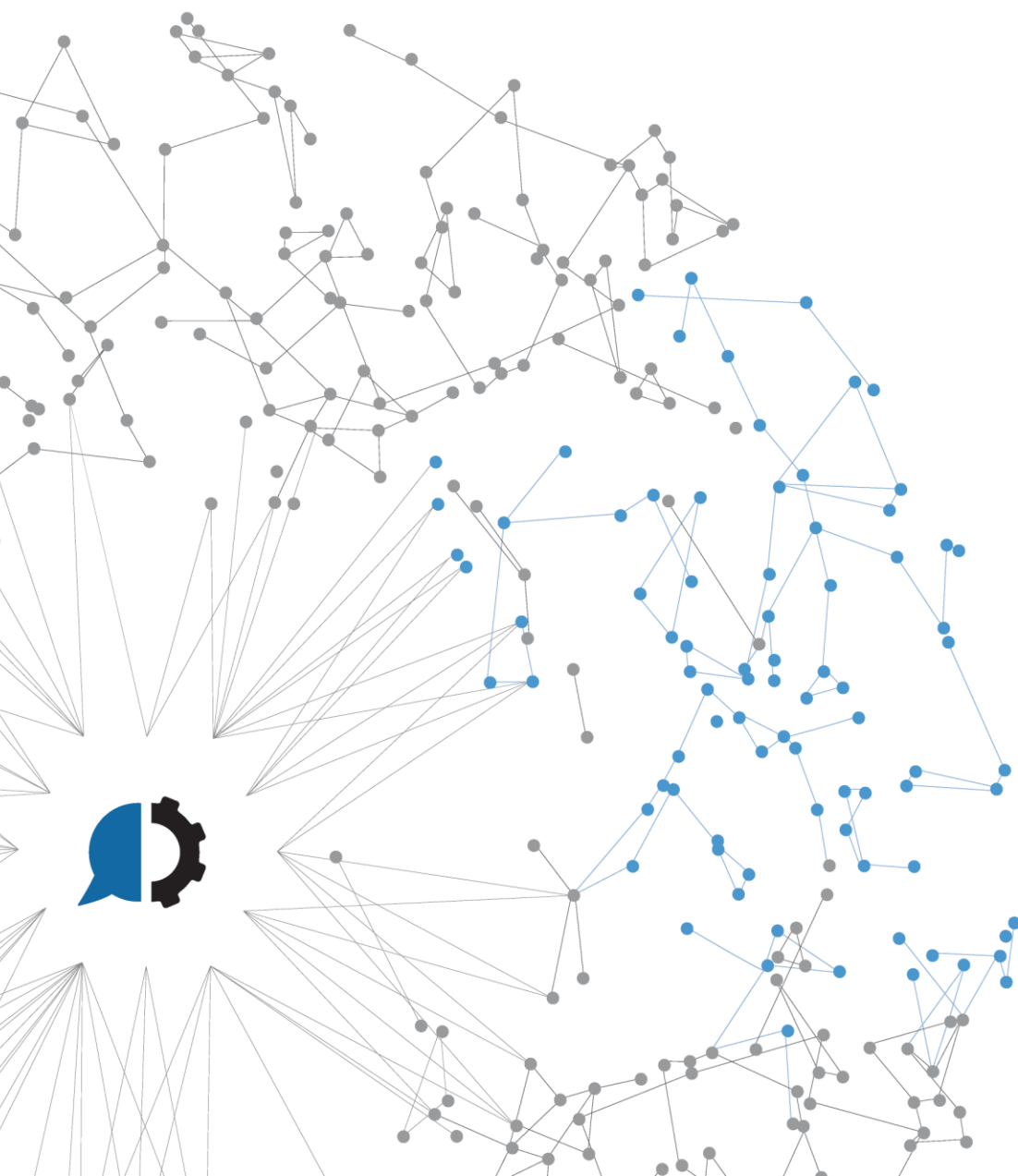




SMARTSHEET

FORM RETRIEVAL





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OVERVIEW

This how to guide introduces the *SmartSheet - Form retriever* process. Instead of spending precious time and resources on repetitive, manual tasks, let Automate go to work and streamline your IT and business processes with robotic process automation. With the help of Automate we can take over manual steps which greatly reduces the repetitive activities and improves the quality and consistency of the work. The top processes being automated are reports generation, file movement, data import and export, and scheduling batch processing.

SmartSheet - Form retriever process connects through APIs to retrieve your Form responses directly from Smarthseet. We use your Bearer token and download the result as a spreadsheet for later analysis.



PREREQUISITES

- **Automate:** The *SmartSheet - Form retriever* BOT depends on Automate software in order to work. The minimal supported versions are:
 - [Automate Ultimate 11.2](#)
 - [Automate Plus 11.2](#)
 - [Automate Desktop 11.2](#)
- **Automate Markup Language file (.AML):** The primary file type used in Automate which contains the steps of our *SmartSheet - Form retriever* BOT
- **SmartSheet information:** Each implementation of this bot must include at least 3 parameters
 - Please register as a [developer](https://developers.smartsheet.com/) in here: <https://developers.smartsheet.com/>.
 - **SmartSheet ID:** Go to the specific sheet that you want to get data from in your Smartsheet account. On the left side menu, select the Sheet Actions icon. Select Properties. Copy the Sheet ID
 - **SmartSheet Token:** Log on to Smartsheet. In the Account menu with the user icon on the top right, select the Apps & Integrations. In the Personal Settings window, select the API Access option in the menu to the left. Under Manage API Access Tokens, click the Generate new access token button. Name your new access token and click OK

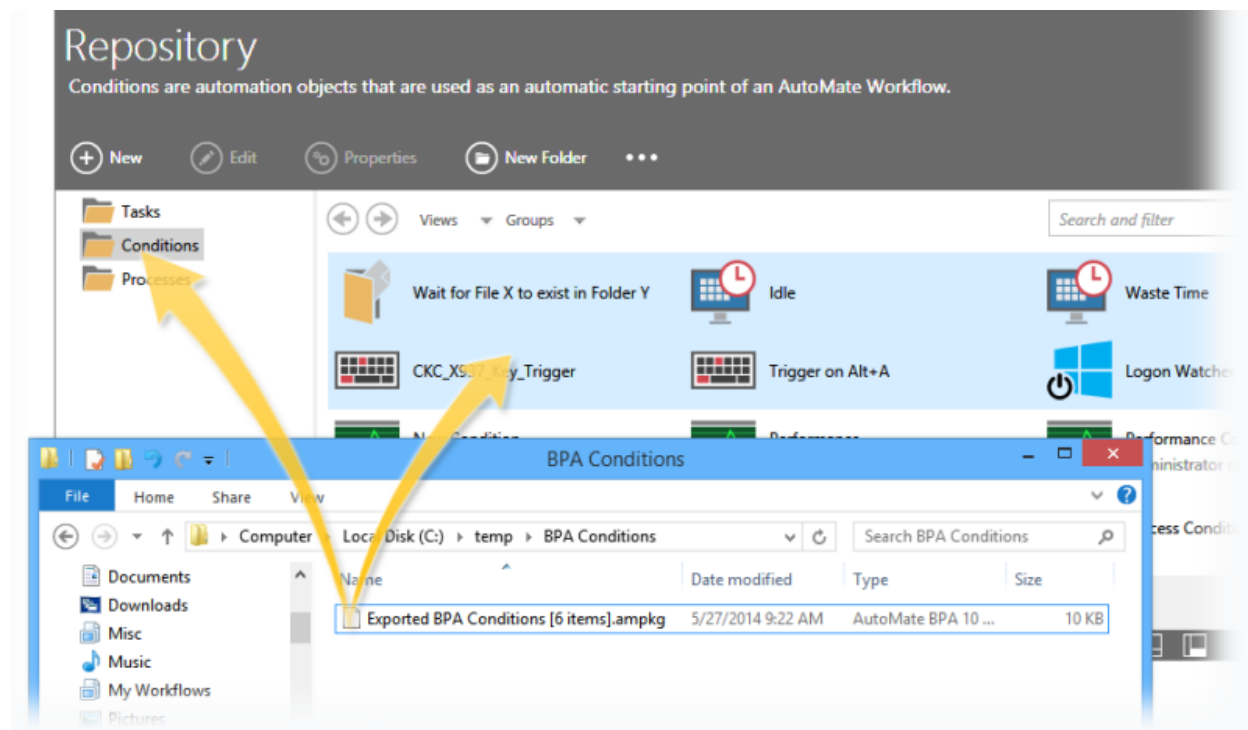


HOW TO IMPORT AN AUTOMATE TASK

Compatible file types can be imported to the repository via drag-and-drop

From the [Studio](#), navigate to the Repository section

Drag the desired file(s) from its original location and drop them into the folder in the [studio](#). Files can be dropped into the folder icon or the main panel (as shown below). Imported object(s) are automatically placed into their corresponding repository location.



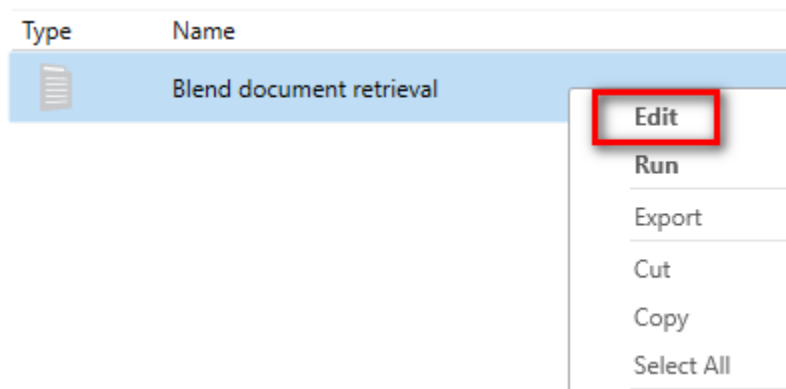


HOW TO EXECUTE THE SMARTSHEET - FORM RETRIEVER

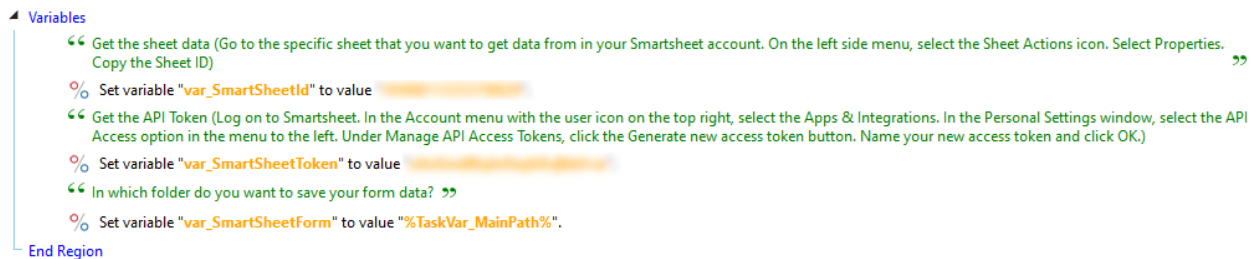
If this is the first time running this task, we will need to set some parameters. Please refer to the Prerequisites section of this document.

Open the [Studio](#) and locate the imported task

Edit the imported task by right clicking on the task and selecting [edit](#)

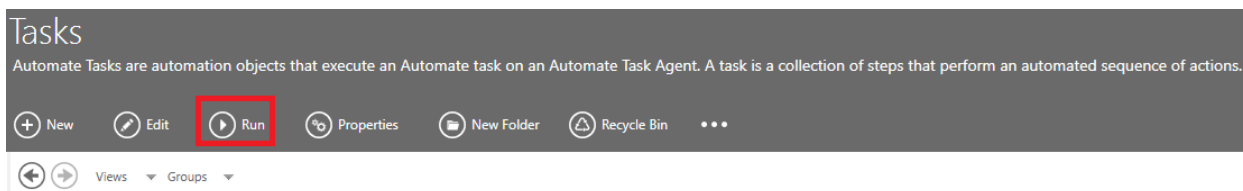


Edit your variables according to your desired output:



[Save and close](#) the task

Select the task and click on [Run](#)



Select your [bot](#) and click on [Run](#) again



Tasks

Automate Tasks are automation objects that execute an Automate task on an Automate Task Agent. A task is a collection of steps that perform an automated sequence of actions.

New Edit Run Properties New Folder Recycle Bin ...

- Tasks
 - Samples
 - SAP Bots
 - Tareas útiles
 - Conditions
 - Processes



Select Agent/Agent Group

Select the Agent/Agent Group to run the task or process on

Name
AUTOMATE85QA001

Run

Cancel



APPENDIX A – SMARTSHEET - FORM RETRIEVER OUTPUT EXAMPLE

Each time you run the bot, a spreadsheet will be created using the name of your Form.
By default it will be located in *C:\Automate\Tasks\Task_Name*

TaskName is the actual name of the task. By default is *SmartSheet - Form retriever*

SmartSheet vs Spreadsheet

Name	Email	Ok	Comments
Paul William Necklen	paul@helpsystems.com	Yes	I feel great
Dario Soria	Dario@helpsystems.com	Yes	Day 2 - Feeling Great Still

	A	B	C	D
1	Name	Email	Ok	Comments
2	Paul William Necklen	paul@helpsystems.com	Yes	I feel great
3	Dario Soria	Dario@helpsystems.com	Yes	Day 2 - Feeling Great Still
4				



APPENDIX B - TROUBLESHOOTING

- **Logs:** Each iteration of our BOT creates a Log file for troubleshooting. You can locate the log file under C:\Automate\Tasks\<<TASK NAME>>. By Default, the task name is *Blend – Document retrieval*.



About HelpSystems

Organizations around the world rely on HelpSystems to make IT lives easier and keep business running smoothly. Our software and services monitor and automate processes, encrypt and secure data, and provide easy access to the information people