# Getting Started with RAPid Extract Studio

## Introduction – Prerequisites

Users wishing to install and run the RAPid Extract Studio Agent on their local machine for the first time must have Windows admin privileges.

If not, they will have to contact their system administrator to run the installer on their machine. Users must have the following already installed on the same machine:

.NET Framework: v4.5.1
SAP GUI 7.3.0.

Users must have valid RAPid credentials and valid SAP credentials.
Only Windows 7, Windows 8 and 8.1, Windows Server 2008 and Windows Server 2012 operating systems are supported.

1. Log into RAPid

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### Log In

User name

Password

☐ Keep me signed in            **LOG IN**
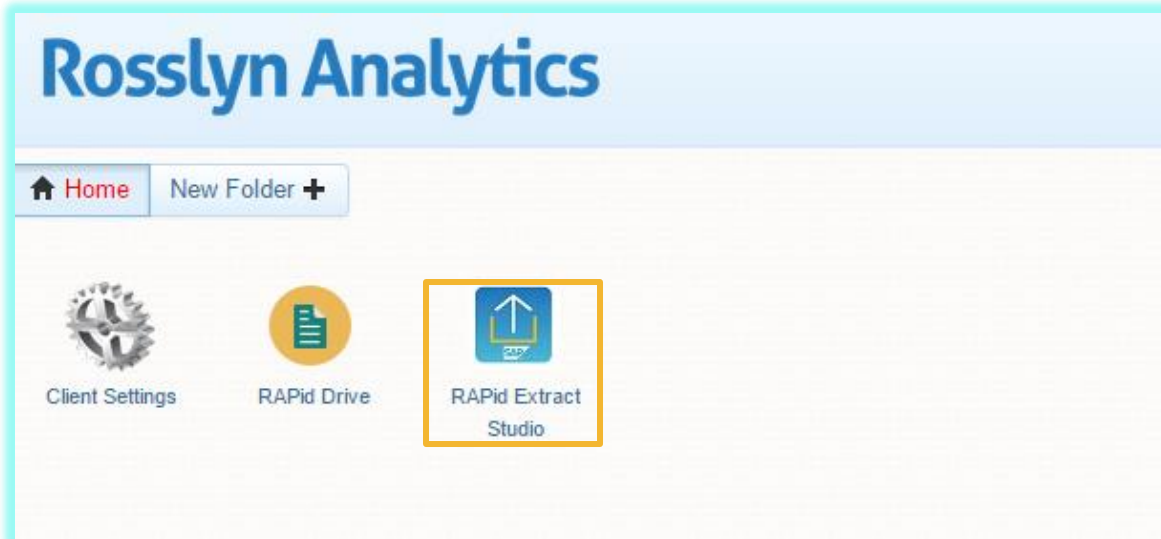
» Login with Azure Account?
» Forgot your password?
» Schedule a demo

Support

Terms and Conditions

ISO Certification

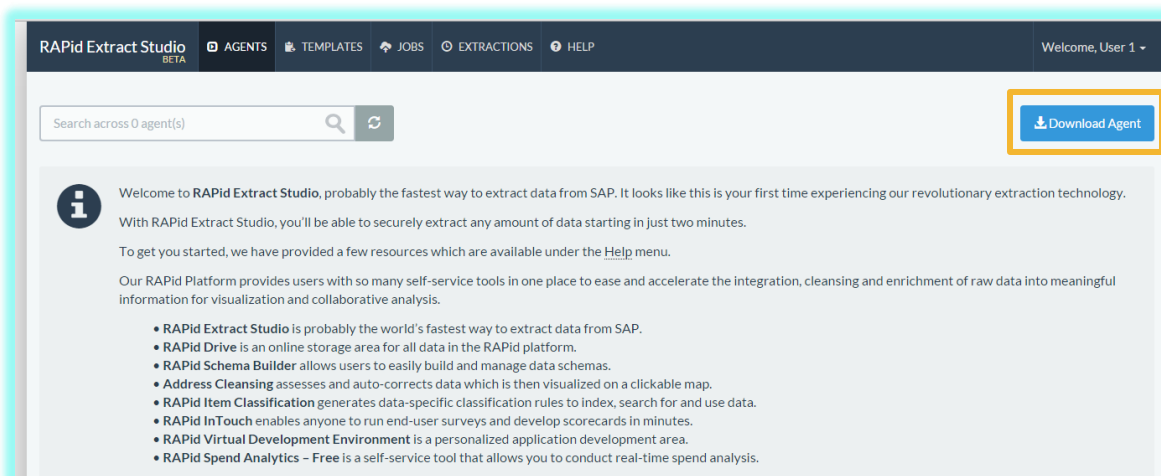© Rosslyn Analytics 2015 - All rights reserved.

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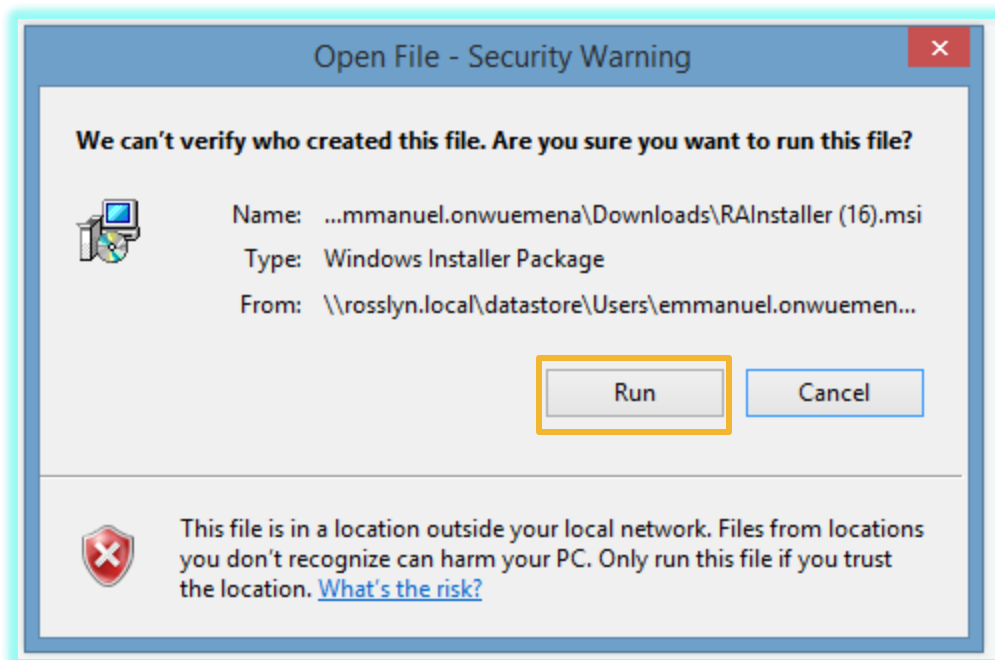2. Open the RAPid Extract Studio app on your homepage



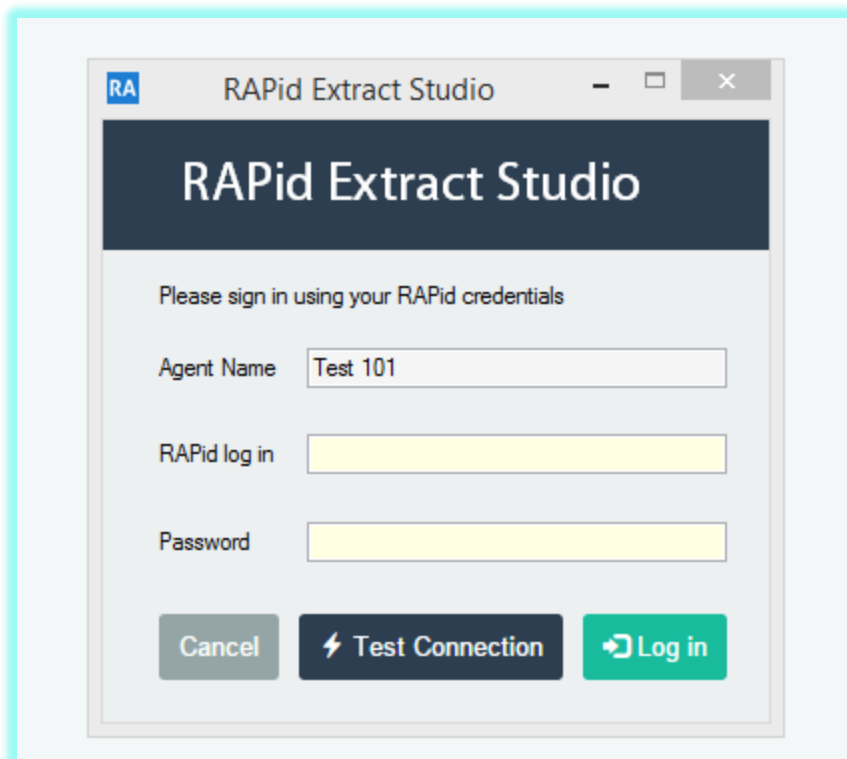3. Download Agent from the Agents tab by clicking on 'Download Agent' Button

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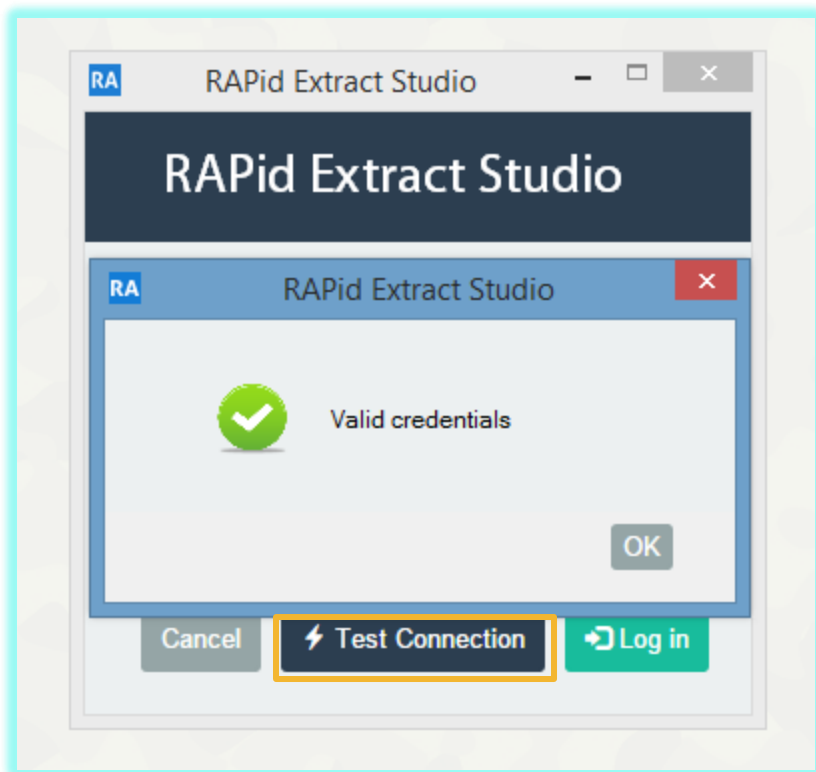4. Once downloaded, run the application.



5. A pop up dialog should appear after installing the Agent. The Agent Name field will be prepopulated with the machine name. This field can be edited.
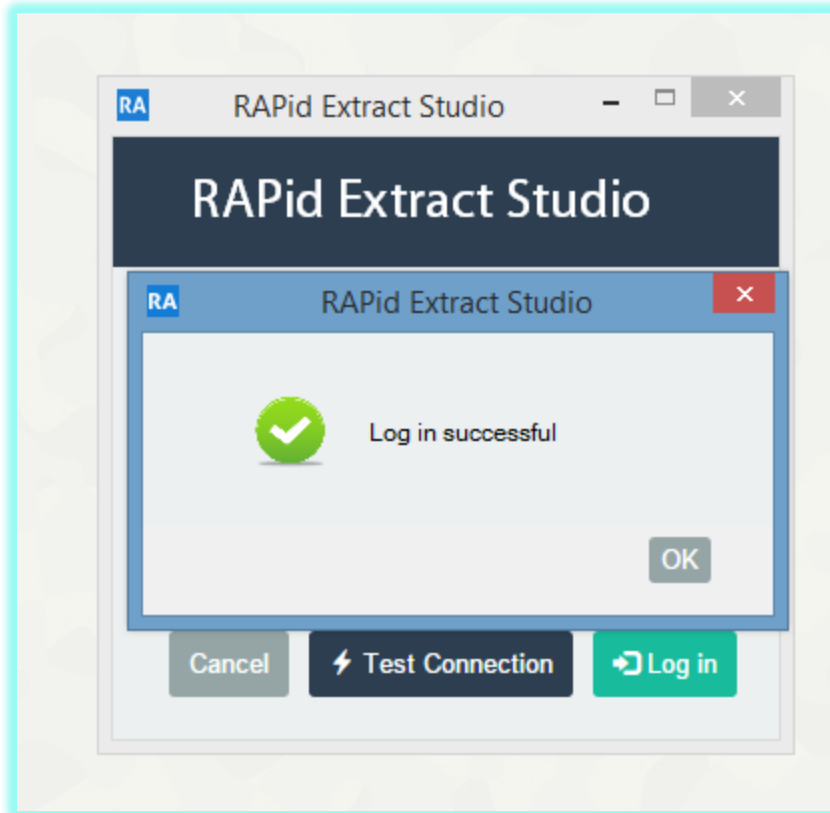
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6. Test connection with Valid RAPid Credentials

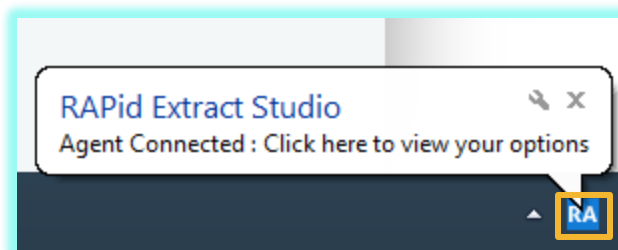# Getting Started with RAPid Extract Studio



7. Successful login

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NB: A client can only install one agent per machine.

8. A pop up message will appear. Click on the RA icon in the desktop tray and select 'Manage Credentials' from the menu to reveal the SAP credential's dialog box



9. The SAP credential dialog should look like this. Enter SAP credentials and click 'Add' to begin the metadata extraction process or 'Test' to test credentials.
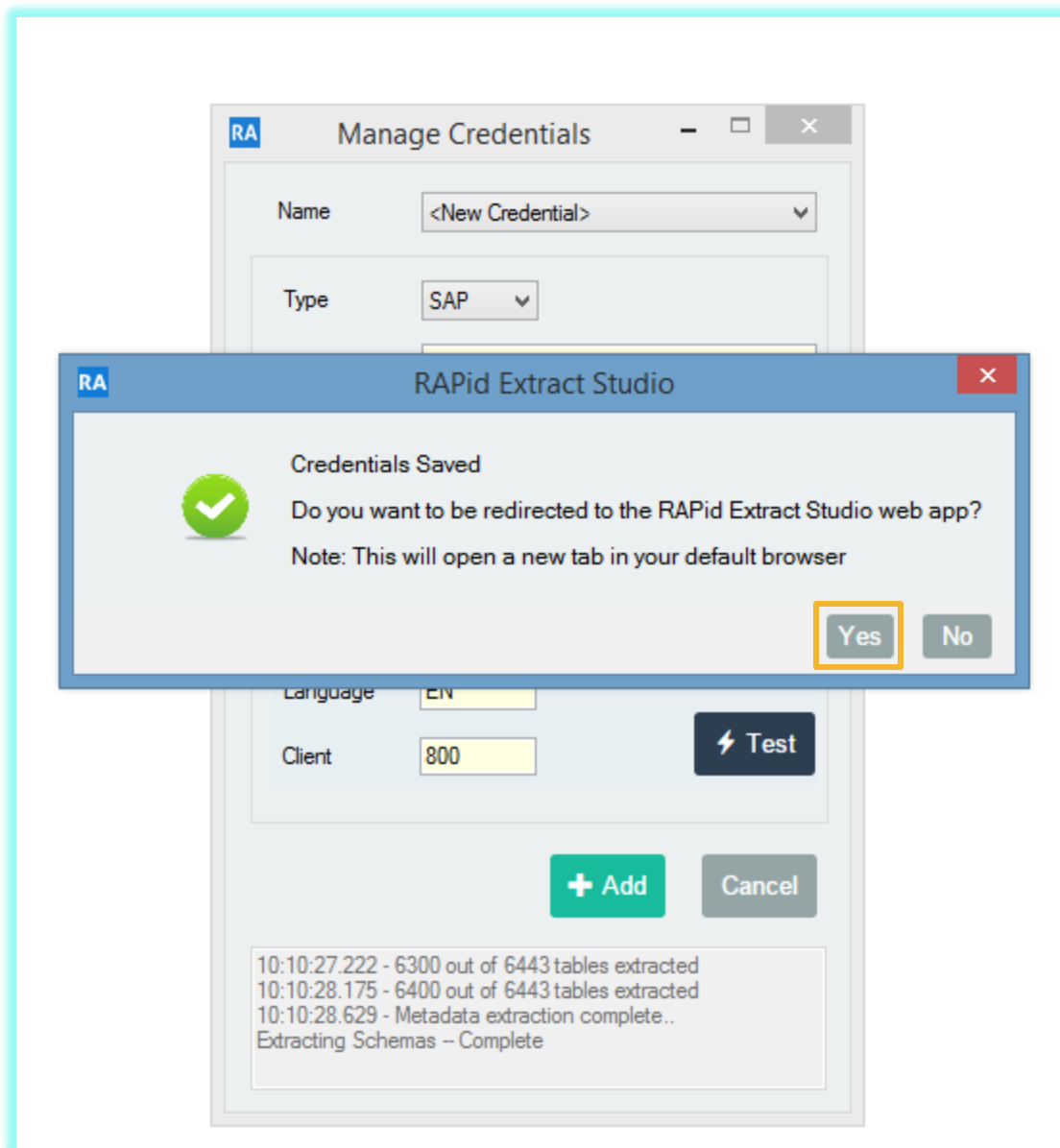
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10. A dialog should pop up after successfully extracting metadata. This may take a few minutes. Click 'Yes' to open RAPid Extract Studio web app in a new tab or 'No' to close the dialog.
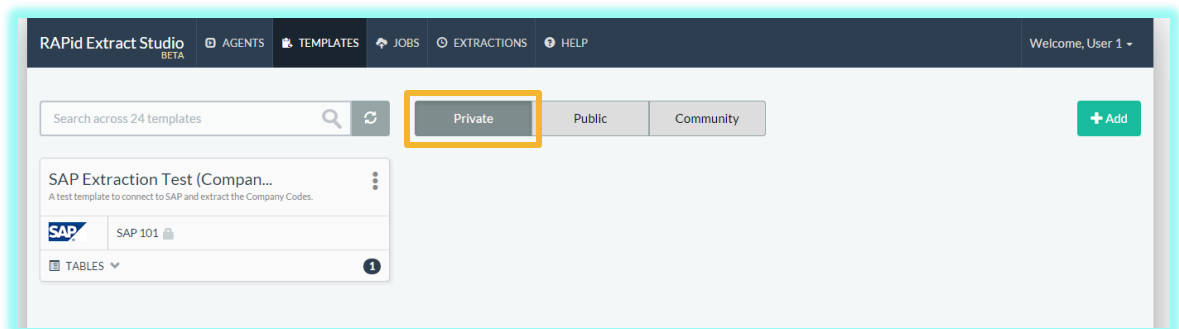
# Getting Started with RAPid Extract Studio



11. Refresh the Agents tab in the extract studio application on RAPid and you will see your Agent populated.

# Getting Started with RAPid Extract Studio
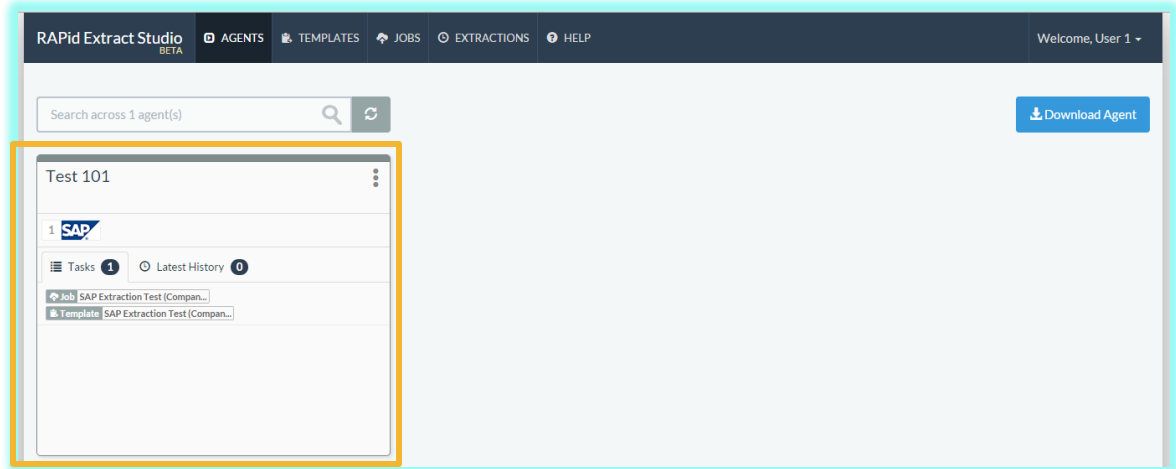


12. To begin extraction, create your template by navigating to the 'Templates' page. The 'Templates' page is made up of 3 tabs namely 'Private', 'Public' and 'Community'. There will be 2 out of the box templates created in the Private & Public tabs. These templates are optional to use. When creating a template, every user gets the option to make their template private or visible to every user (Community).

**Private templates** are templates that are only visible and accessible to a client. These templates can be edited/updated and cloned when creating a new template.



**Public templates** are predefined templates created by Rosslyn and are read only (cannot be edited). These templates can be cloned when creating a new template.

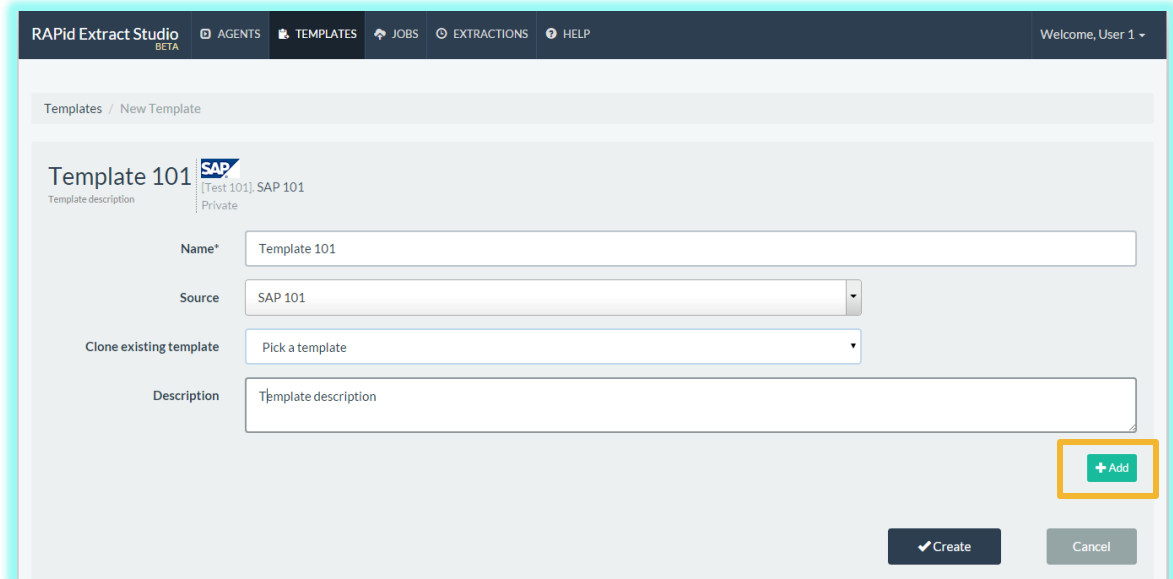# Getting Started with RAPid Extract Studio
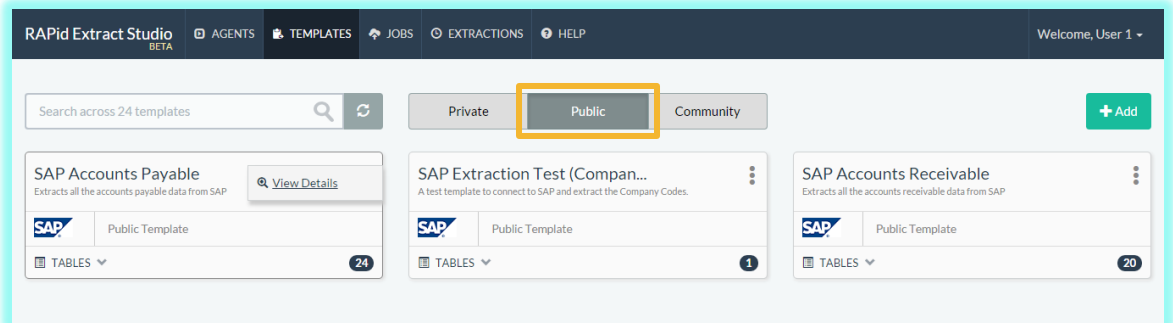


**Community templates** are templates created by other users. These templates can be cloned when creating a new template or you can define your template by creating a new one.
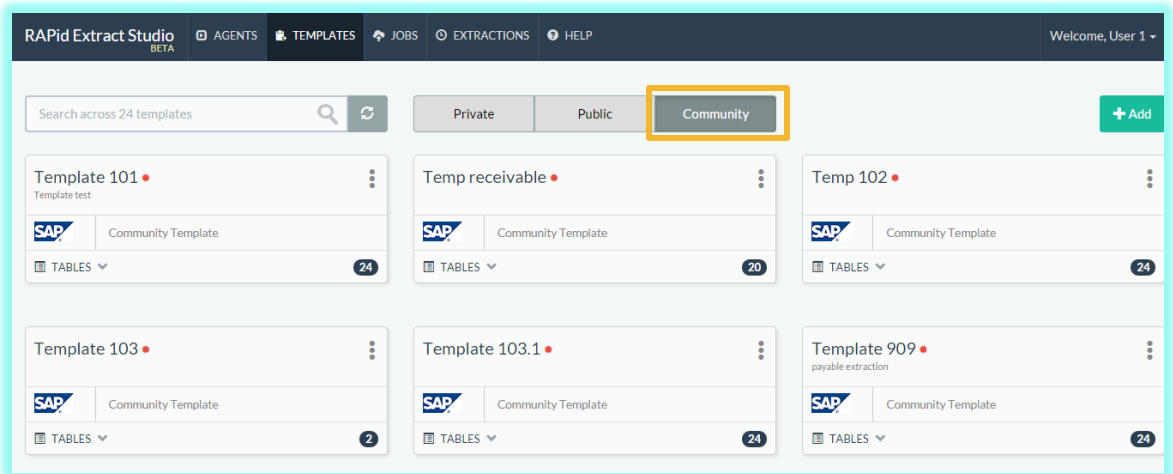




13. To add a template, click on the 'Add' button and fill out the free text fields. You can pick an existing template from the drop down menu or define your template by clicking the 'Add' button.

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14. Once the 'Add' button is clicked, a table template will appear below. You can select the columns to extract from, add filters and joins to each of the SAP tables selected. You can add as many tables as possible to a template by continuously clicking on the 'Add' button.

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15. After creating your template, click on 'Create' button at the bottom of the page to save the template.
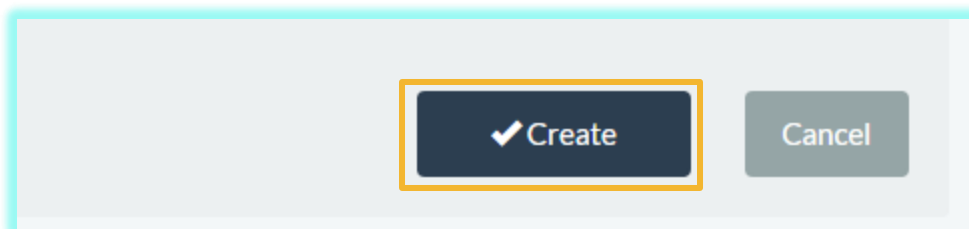


16. A confirmation pop up window will appear. Uncheck the check box ☑ to save the template as Private. The default is checked. Templates saved as Community will be visible to all clients that use the RAPid Extract Studio and can be copied, while templates saved as Private will only be visible to users for a specific client. Click 'OK' to confirm your action.

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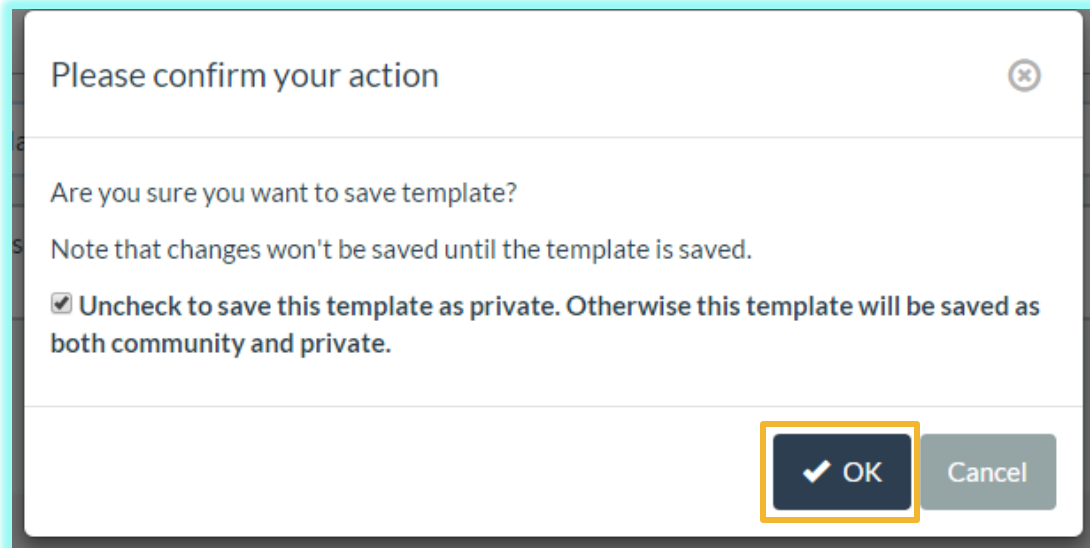


17. Once the template has been saved successfully, the newly created template will appear in the template page.
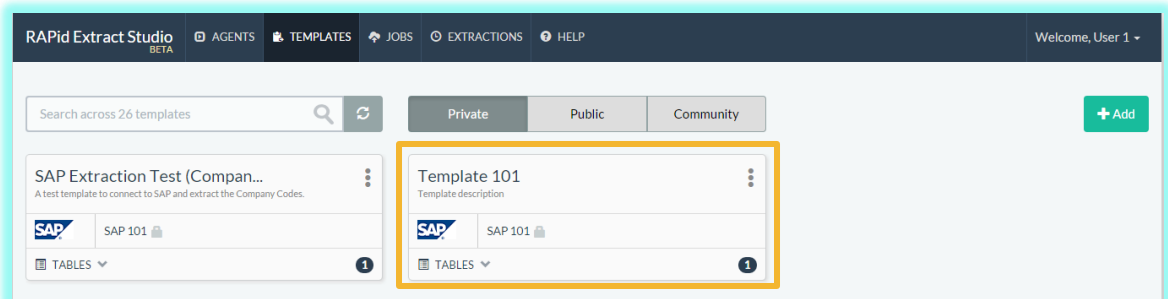


18. To define an extraction job, click on the 'Jobs' tab. There will be an out of the box job created that is linked to the out of the box template. This predefined job is optional and can by edited. To create a new job, click 'Add' button.

# Getting Started with RAPid Extract Studio
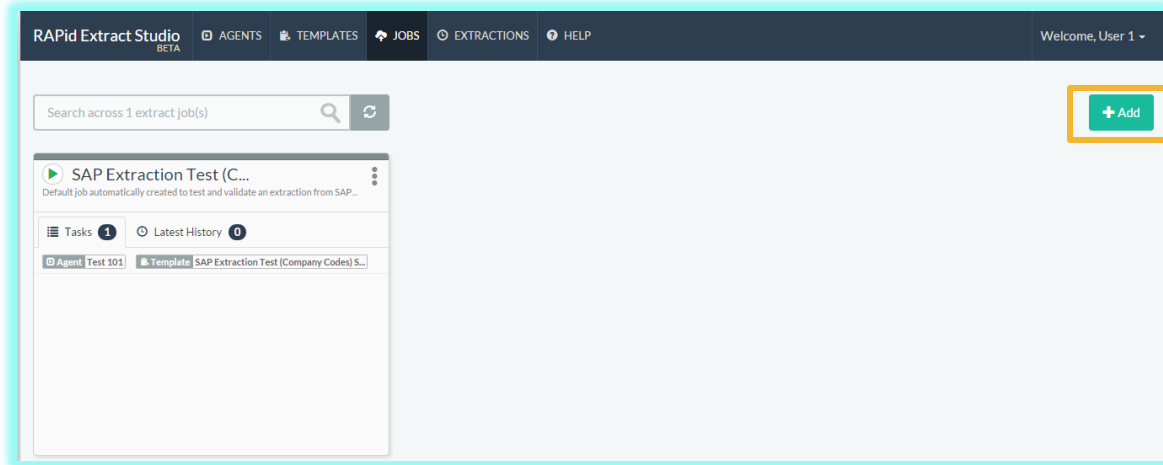


19. Enter a job name and description in their respective fields and click on 'Add' to create an extraction task. Select a template from the template drop down field. You can add more than 1 extraction task to a job by clicking on the 'Add' button again.
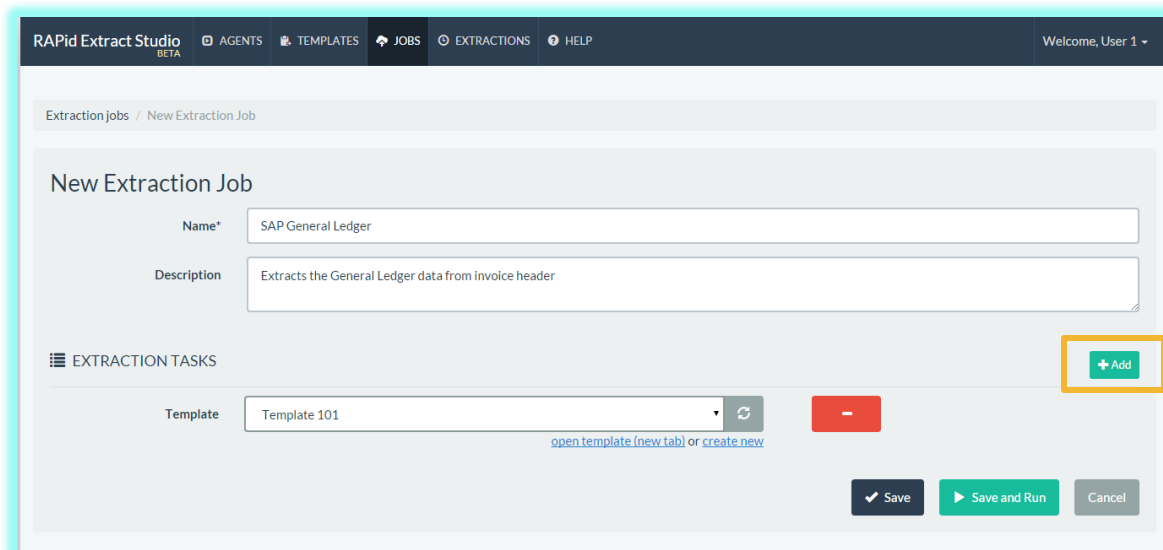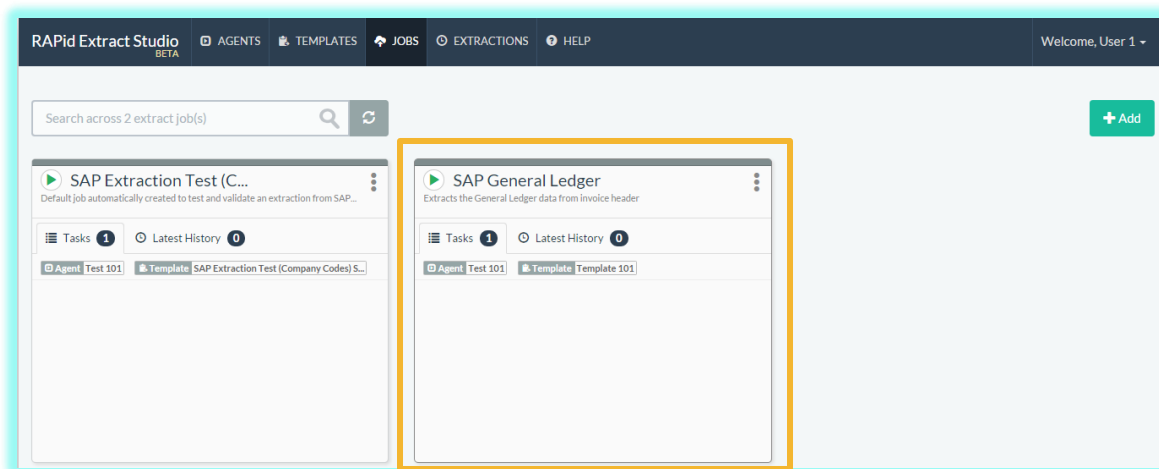


20. Save the Job for later use by clicking the 'Save' button or click 'Save and Run' to run the job immediately.

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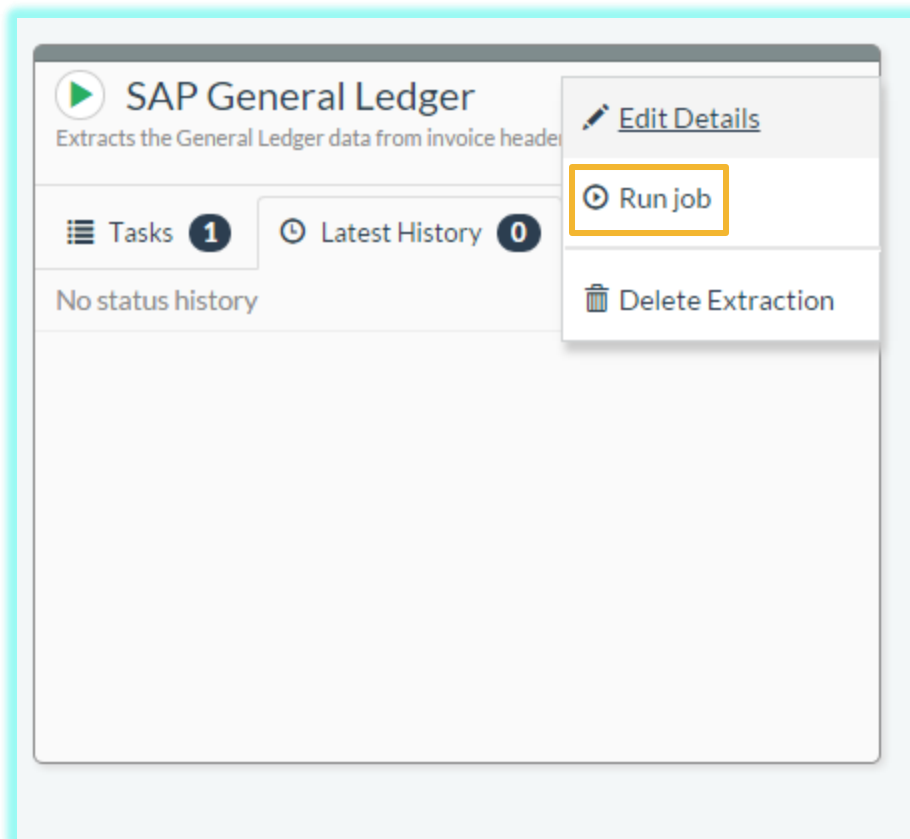
# Getting Started with RAPid Extract Studio
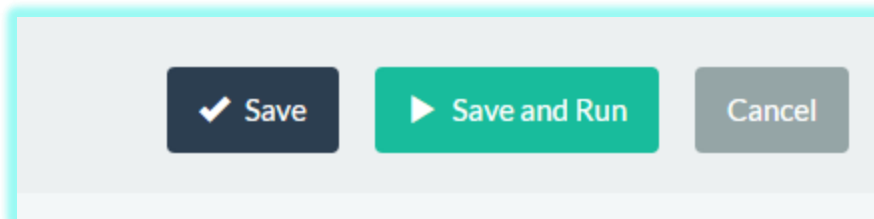


21. After the job has been saved successfully, it will appear on the Jobs tab and is available to be run.



22. To start the extraction, either click on the play button  close to the name of the job or select 'Run job' from the extended options menu.

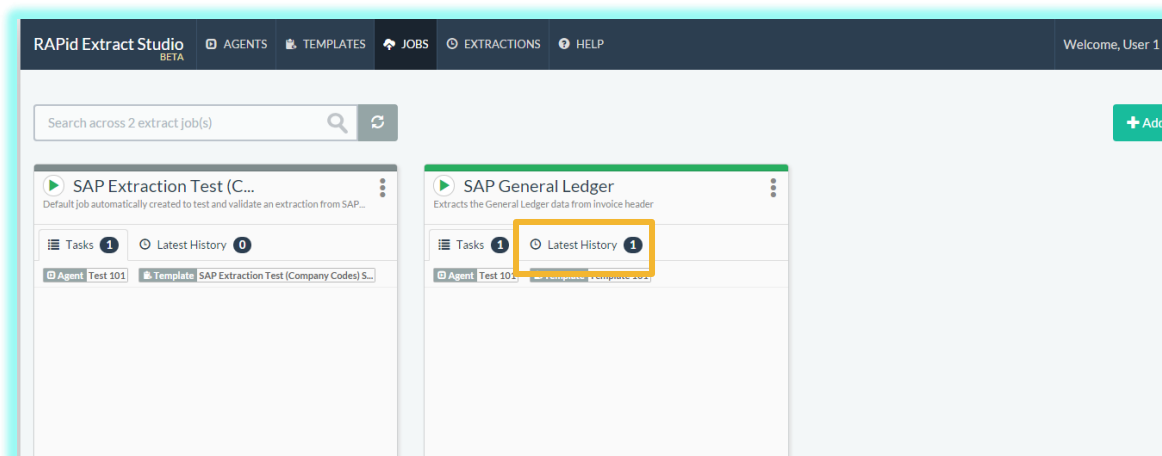# Getting Started with RAPid Extract Studio



23. A confirmation pop up window will appear. Click 'Run' to trigger the extraction

# Getting Started with RAPid Extract Studio
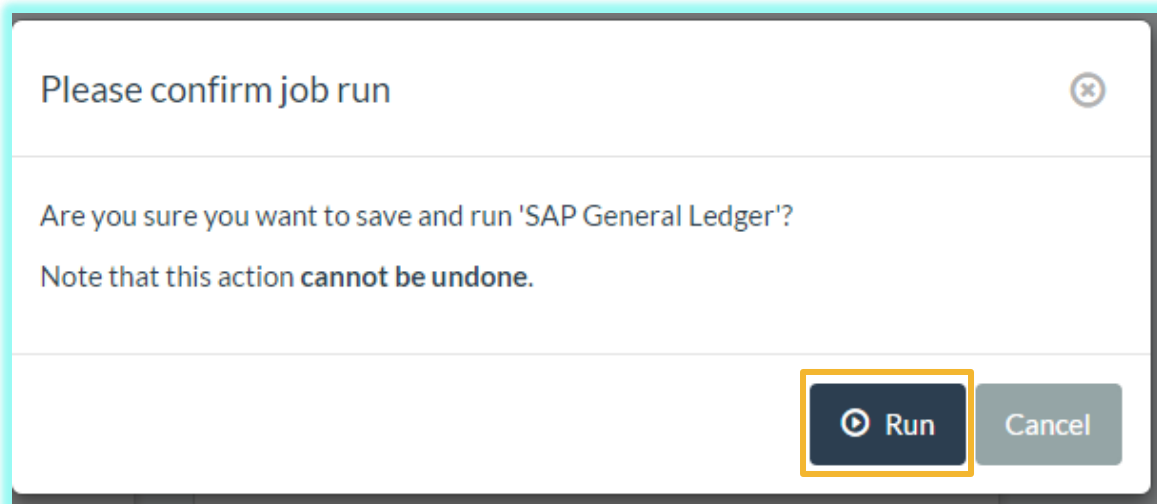


24. The top edge of the job box acts as a status indicator. Grey means the job is inactive; dark blue and light blue stripes means the job is running; Green means the job has been completed successfully and red means that the job failed. The 'Latest History' tab on the job box shows the recent activity.



25. After the job has been run successfully, go to the desktop tray, click on the RA icon and select 'Preview Data' from the menu to preview the extracted data before upload.
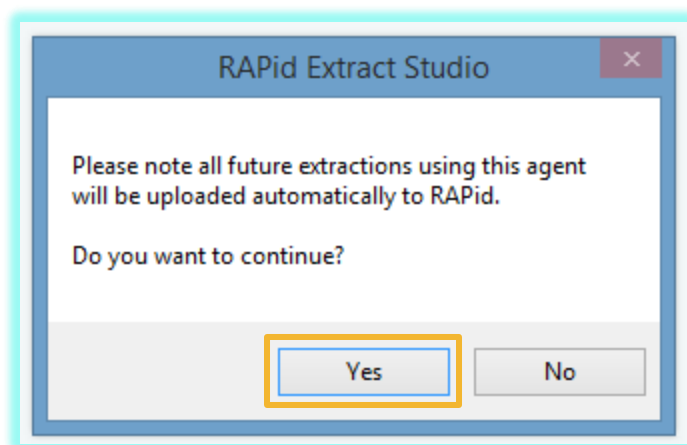
# Getting Started with RAPid Extract Studio
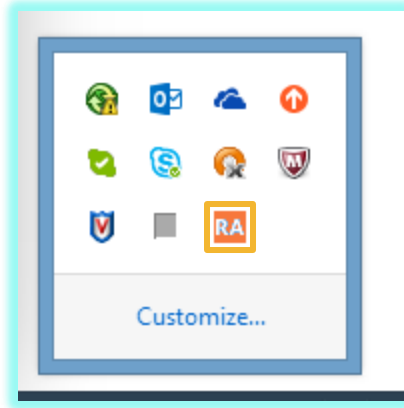


26. Click 'Approve for Upload' if the preview is acceptable. The 'Approve for Upload' process only happens once. All jobs run in the future from this agent will be uploaded to RAPid automatically without approving for upload. This process is only reversible by disabling the Agent from the desktop tray by clicking on the RA icon and selecting 'Disable'. To enable this agent again, you will have to perform the same process of running a job again and approve the preview data. After approving for upload, the Agent becomes enabled automatically.

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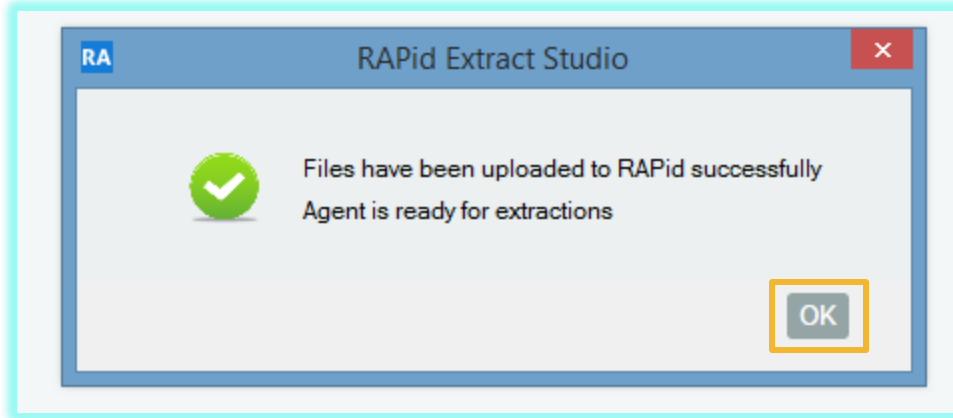# Getting Started with RAPid Extract Studio
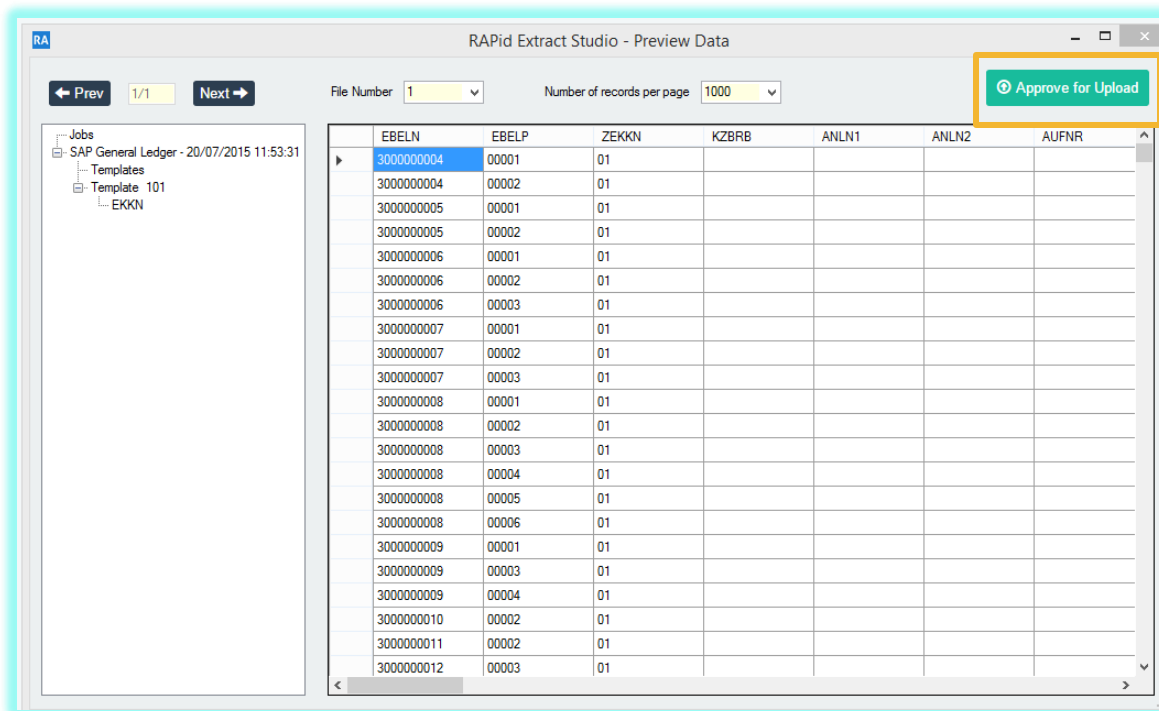


27. A confirmation dialog will appear. Click 'Yes' to approve upload.



28. A pop up window will appear. Click 'Ok' to close this window

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**NB:** When the agent is enabled, the RA icon is green ; when data is available for preview, the RA icon is orange and when disabled, it is blue .

29. All extraction jobs that have been run successfully will appear on the 'Extractions' tab in the RAPid Extract Studio application on RAPid. To view the extracted file, click on 'Download'.