Botream
ROBOTIC PROCESS AUTOMATION

Installation Guide

On-premise installation of the Botream RPA platform: server, database, agents and browser extension.

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0.1.16

DATE
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This guide describes the on-premise installation of the Botream RPA platform. The installation consists of two packages:

Package	Where to install	What it installs
`Botream-Server-<version>.msi`	The server (once)	Web app, API, scheduler and the **BotreamServer** Windows service
`Botream-Agent-<version>.msi`	Every Windows machine that runs tasks	The agent (tray app + **BotreamAgent** Windows service) and the browser extension

1
SQL Server
2019 or later; Express is enough

2
Server
The `Botream-Server` MSI on the server

3
First-run setup
In the browser on the server: database, administrator

4
Agents
The `Botream-Agent` MSI on every machine

1 Requirements

Server

- Windows 10/11 or Windows Server, 64-bit
- **SQL Server 2019 or later** (the free Express edition is enough). It can be on the same machine or on another machine in the network. It is the only external component Botream needs.
- Administrator rights for the user running the installation
- A free TCP port (default **3000**)

You do not need to install Node.js or .NET; both are included in the package.

Agent machines

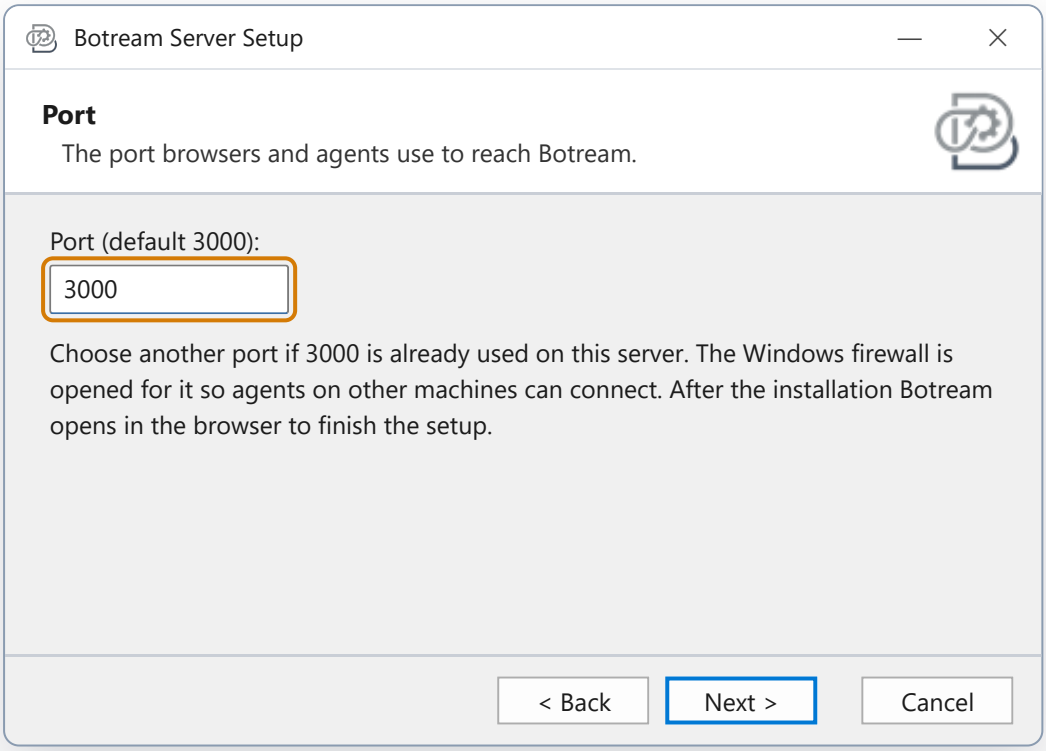
- Windows 10 (version 1809 or later) / Windows 11, 64-bit
- Administrator rights (for the installation)
- Network access to the server (`http://<server>:<port>`)
- Google Chrome or Microsoft Edge for capturing web elements and recording
- The `ocr` and `document` commands use Windows' built-in text recognition: the language to read must be installed under Settings → Time & language → Language (the Windows display language is always installed)

You do not need to install .NET; it is included in the package.

2 Server installation

Run `Botream-Server-<version>.msi` on the server. The wizard goes through these pages:

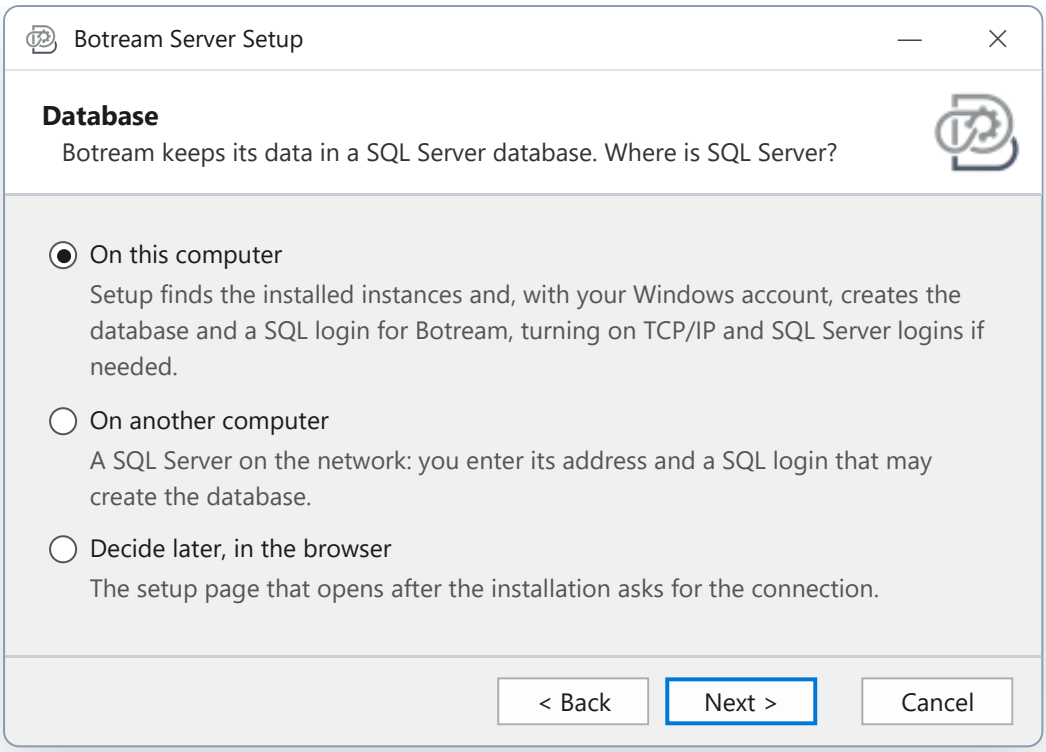
1. **Welcome** — *Next*.
2. **Destination Folder** — The installation folder. Default: `C:\Program Files\Botream Server`.
3. **Port** — The port browsers and agents use to reach Botream (default 3000). The port is opened in Windows Firewall automatically. Choose another port if 3000 is used by another application.



The Port page.

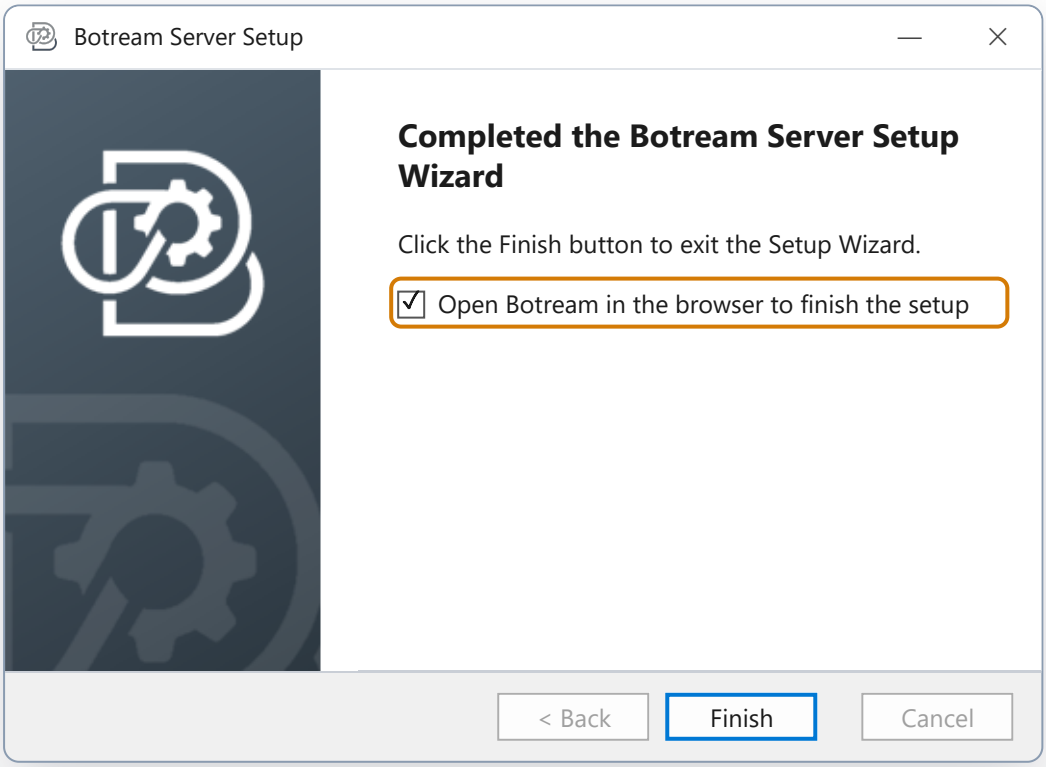
4. **Database** — Choose where SQL Server is:

Option	When	Next page
On this computer	SQL Server is installed on this machine	Asks for the instance and the sign-in method
On another computer	SQL Server is on another machine in the network	Asks for the address, port and SQL login
Decide later, in the browser	You want to enter the connection later	Goes straight to the installation



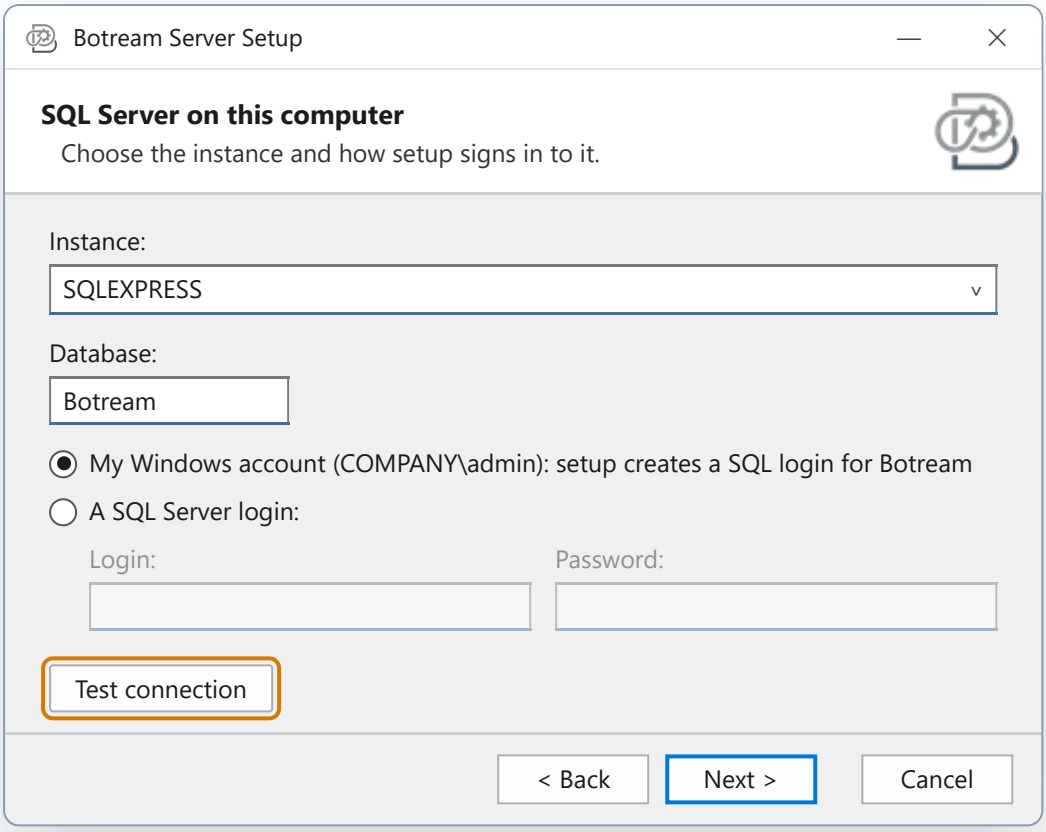
The Database page.

5. Database details depending on your choice (see below).
6. **Ready to install** — *Install*.
7. On the last page leave **Open Botream in the browser to finish the setup** checked and click *Finish*; the first-run setup page opens in the browser.



Leave the box checked: the first-run setup opens in the browser.

SQL Server on this computer (On this computer)

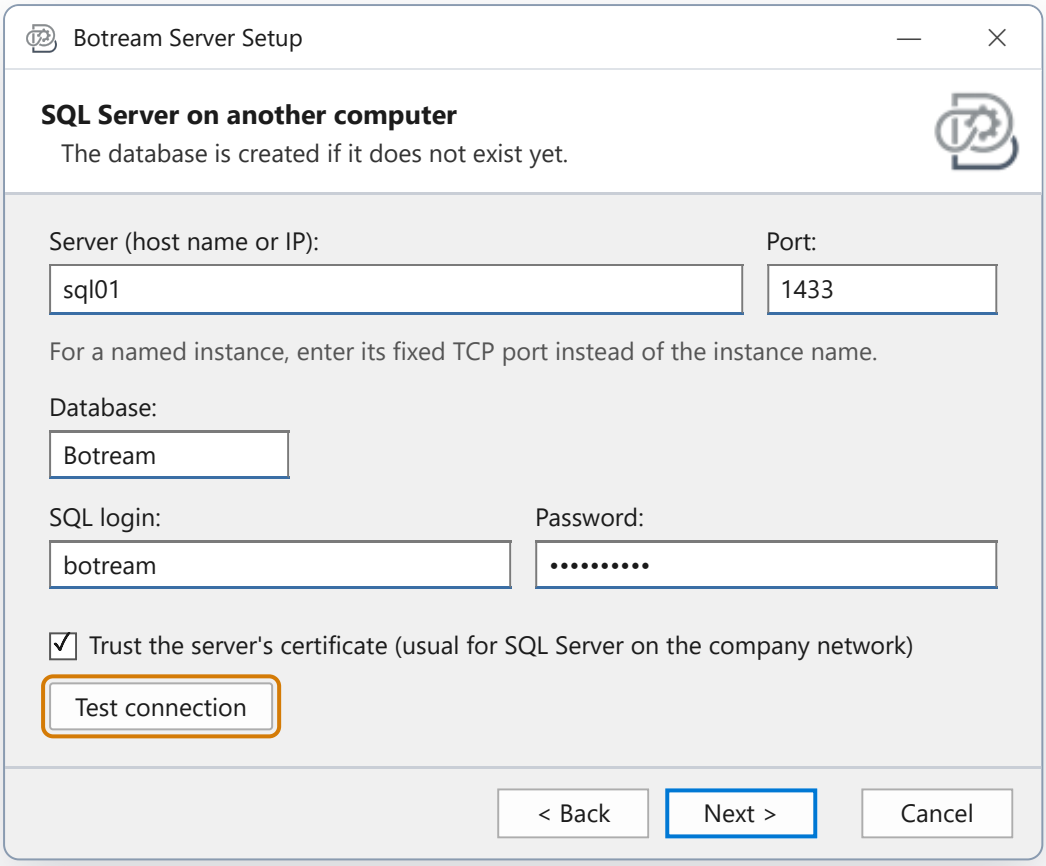


With your Windows account, setup creates the database and a SQL login for Botream.

- **Instance**: The installed instances are listed; choose the one to use.
- **Database**: The database name (default `Botream`). It is created if it does not exist.
- Sign-in method:
  - **My Windows account**: Your Windows account must be an administrator (sysadmin) on this SQL Server. Setup creates the database and a `botream` SQL login that owns it, with a random password. It turns on TCP/IP and SQL Server logins if they are off; SQL Server restarts once for that.
  - **A SQL Server login**: You enter the name and password of an existing SQL login.
- **Test connection** tries the connection; *Next* runs the same check.

If there is no SQL Server on this machine, the wizard says so. Install SQL Server first or use one of the other options.

SQL Server on another computer (On another computer)



A SQL Server on the network: its address, the database and a SQL login that may create it.

- **Server**: Machine name or IP address. **Port**: default 1433. For a named instance, enter that instance's fixed TCP port instead of the instance name.
- **Database**: The database name (default `Botream`). It is created if it does not exist.
- **SQL login / Password**: A SQL login allowed to create the database.
- **Trust the server's certificate**: Usually left checked for SQL Servers in the company network.
- **Test connection** tries the connection.

On the remote SQL Server, TCP/IP must be on, SQL Server authentication enabled and its port allowed in the firewall.

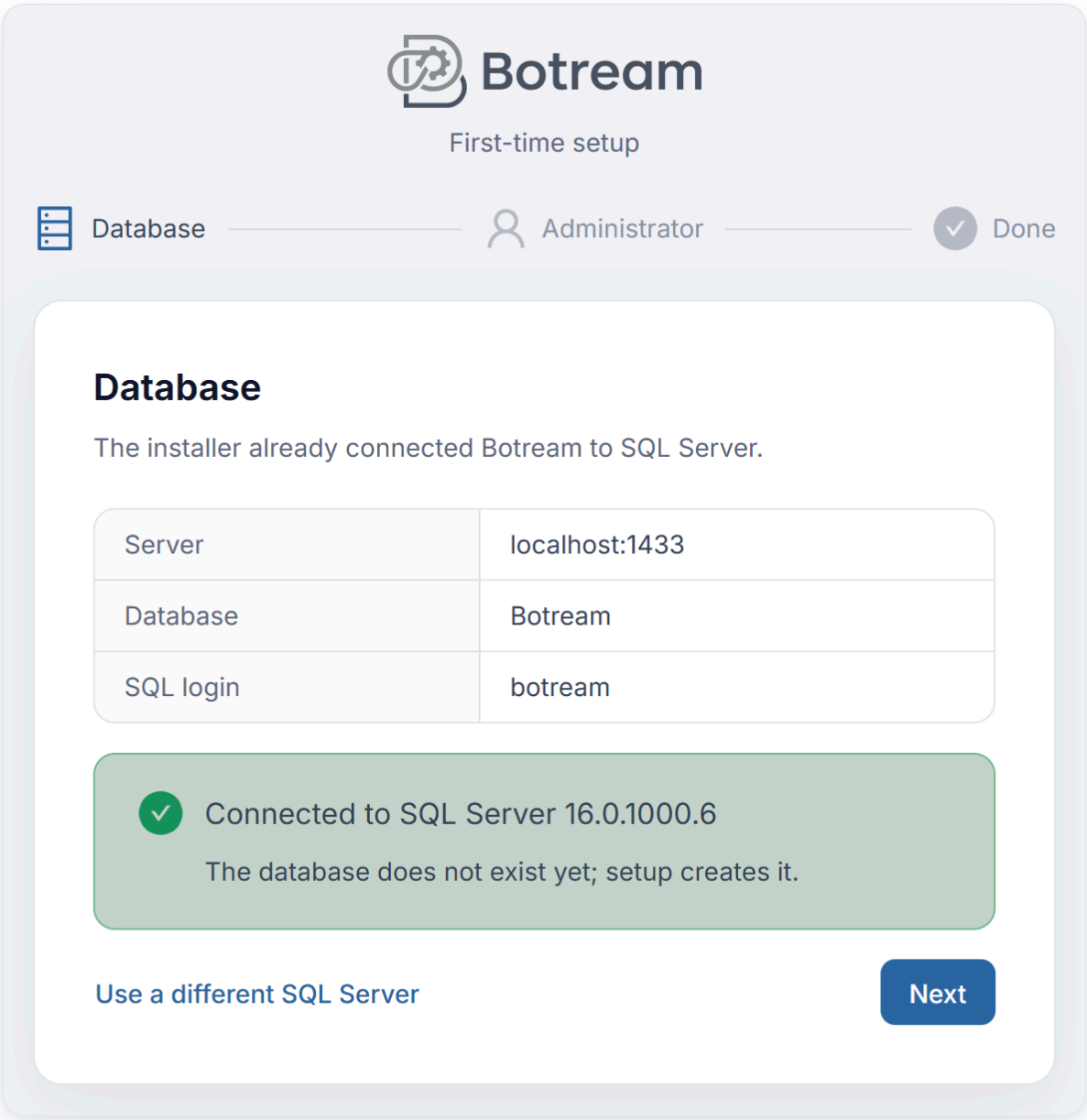
3 First-run setup in the browser

When the installation ends, `http://localhost:<port>` opens in the browser. This page **only works in a browser on the server itself**; setup requests from the network are refused.

The setup has three steps: **Database**, **Administrator** and **Done**.

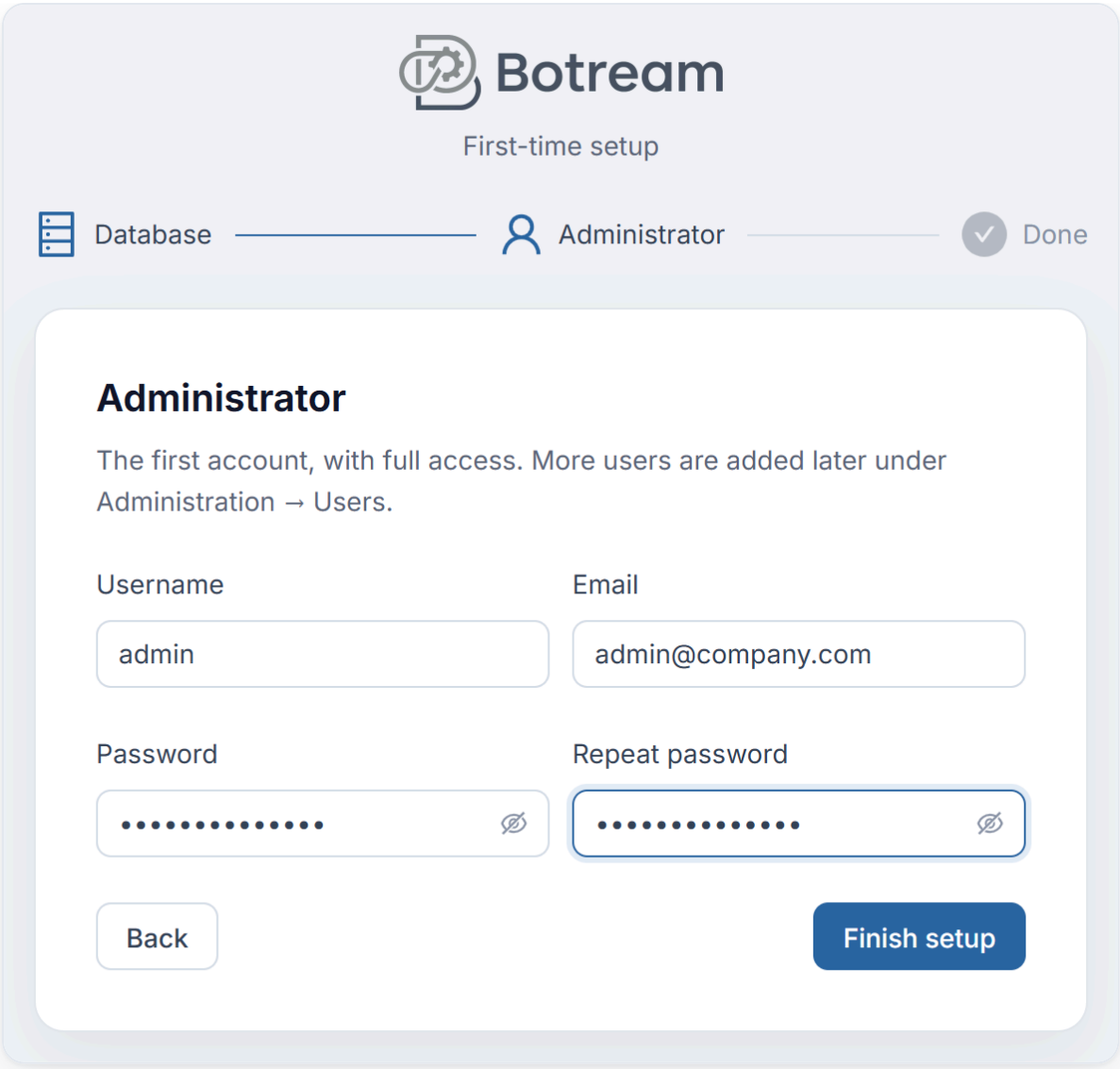
1. **Database** — If you chose the database in the wizard, the page shows the prepared connection and checks it; click *Next*. If you chose **Decide later**, you enter and test the SQL Server connection; the

database and its tables are created.



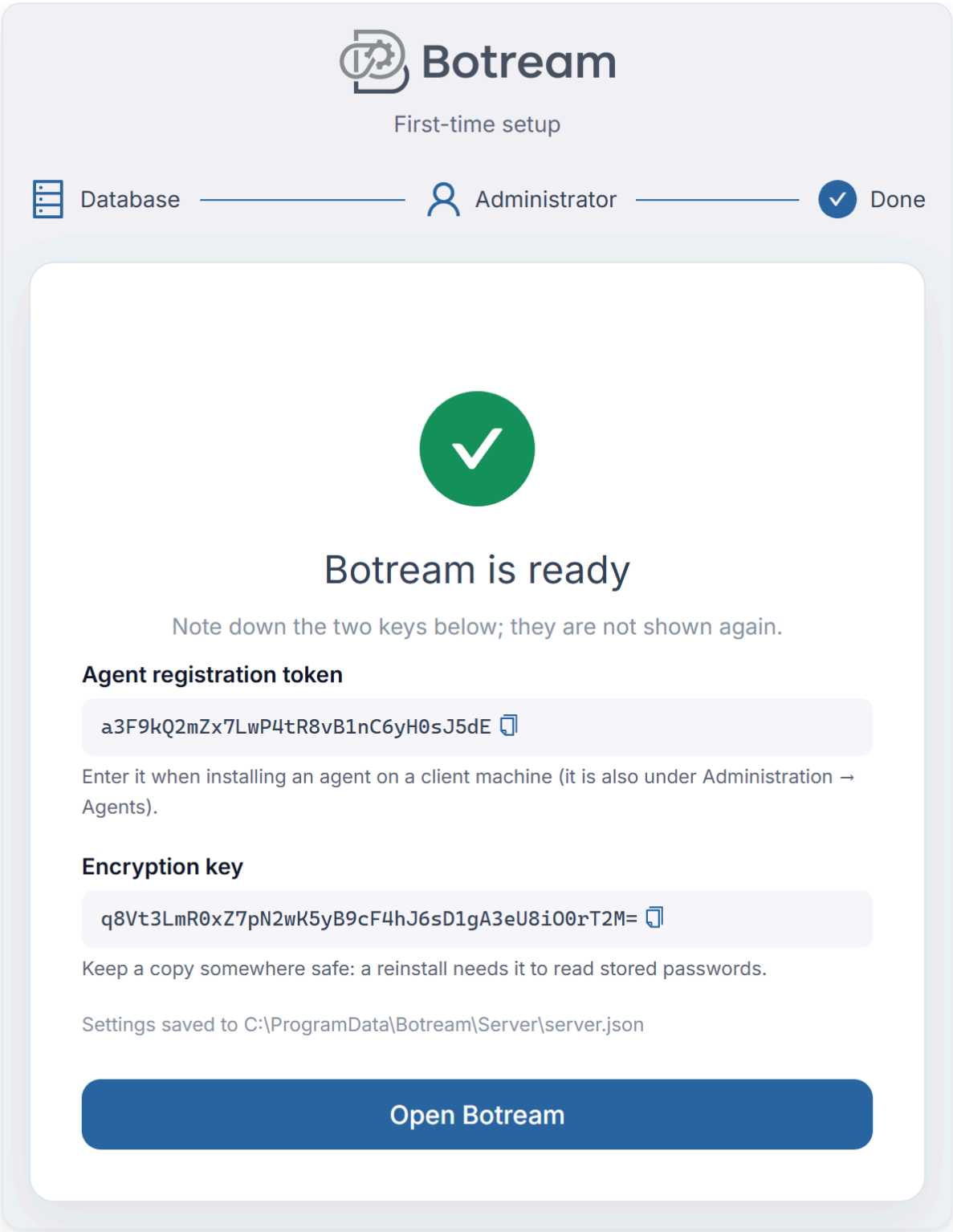
The connection the installer prepared is checked.

2. **Administrator** — The first account, with full access: user name (at least 3 characters), email and password (at least 8 characters). Click *Finish setup*.



The first administrator account.

3. **Done** — The page shows two keys, **once**: the **registration token** you enter when installing agents (also shown later under **Administration** → **Agents** → **Install an agent**) and the **encryption key** that encrypts the vault passwords. Keep a copy of the encryption key somewhere safe: a reinstallation needs it to read stored passwords.



Note down both keys; they are not shown again.

Click *Open Botream*: the server switches to normal operation without a restart and you can sign in with the administrator account. From other computers the address is `http://<server-name>:<port>`.

> **Important — back it up.** Settings and secret keys are in `C:\ProgramData\Botream\Server\server.json`. Without the encryption key in this file, the passwords in the vaults cannot be decrypted. Back up the file to a safe place together with the SQL database.

License

Botream runs as a **30-day trial** from the first start, without limits. To install a license:

1. Sign in as a member of the Admin role and open **Administration** → **Licenses**.
2. Copy the **server key** shown there (25 characters, e.g. `ABCDE-FGHIJ-…`) and send it with your license request. The key belongs to this server's Windows installation; a license works only on the server it was issued for.
3. Upload the `.lic` file you receive on the same page.

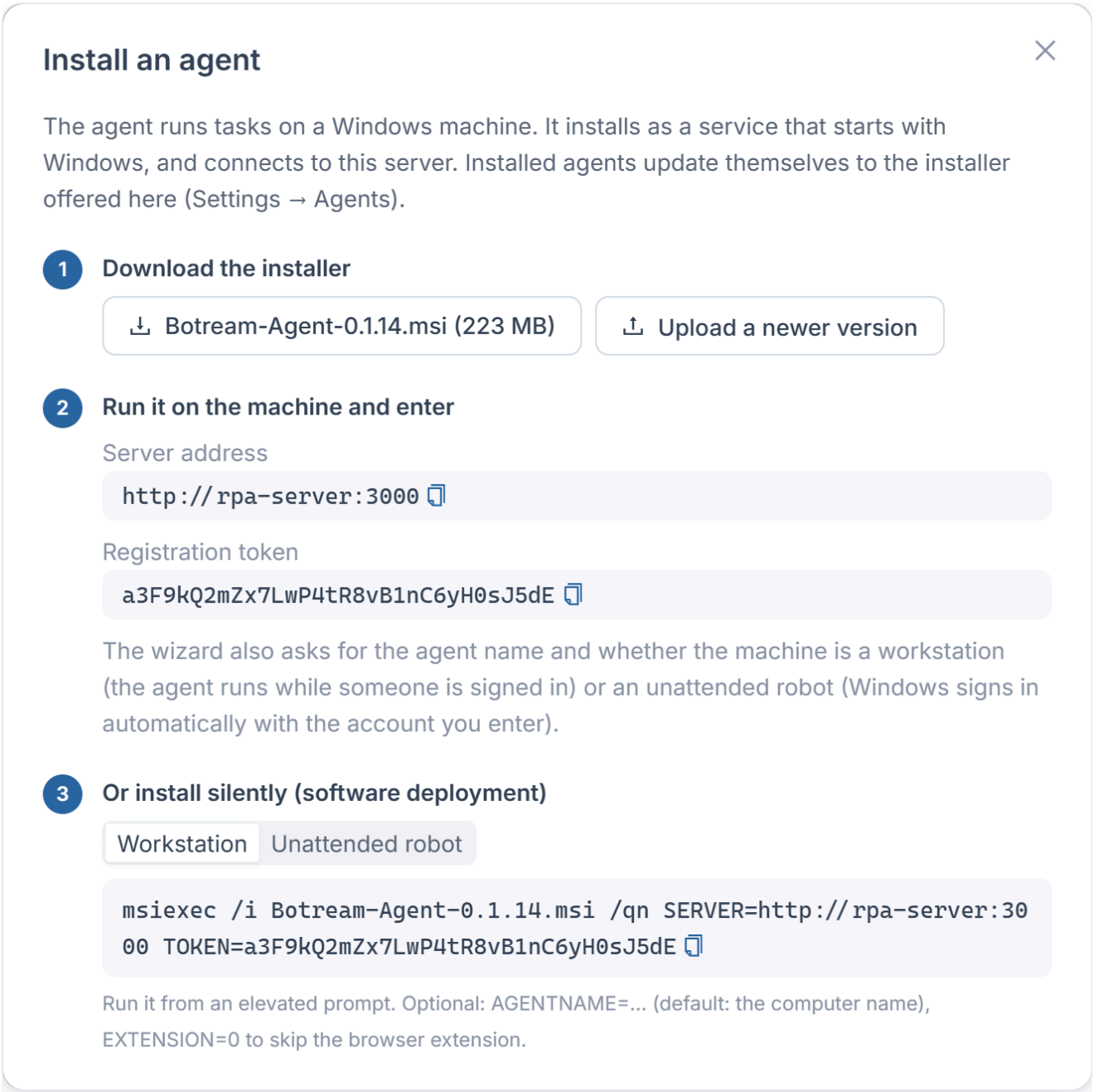
When the license or the trial ends, runs are refused; signing in and editing keep working. Reinstalling Windows or moving Botream to another machine changes the server key: ask for a license for the new key.

4 Agent installation

Getting the package and the details

In the web app, open **Administration** → **Agents** → **Install an agent** as an administrator. There you can:

- download the agent installer (`Botream-Agent-<version>.msi`),
- see the server address and the **registration token**,
- copy a ready command for a silent installation.



Administration → Agents → Install an agent.

> **Note.** If you opened the web app as `localhost`, the server address shown here is `localhost` too, which other machines cannot reach. Use the server's name or IP address with the same port.

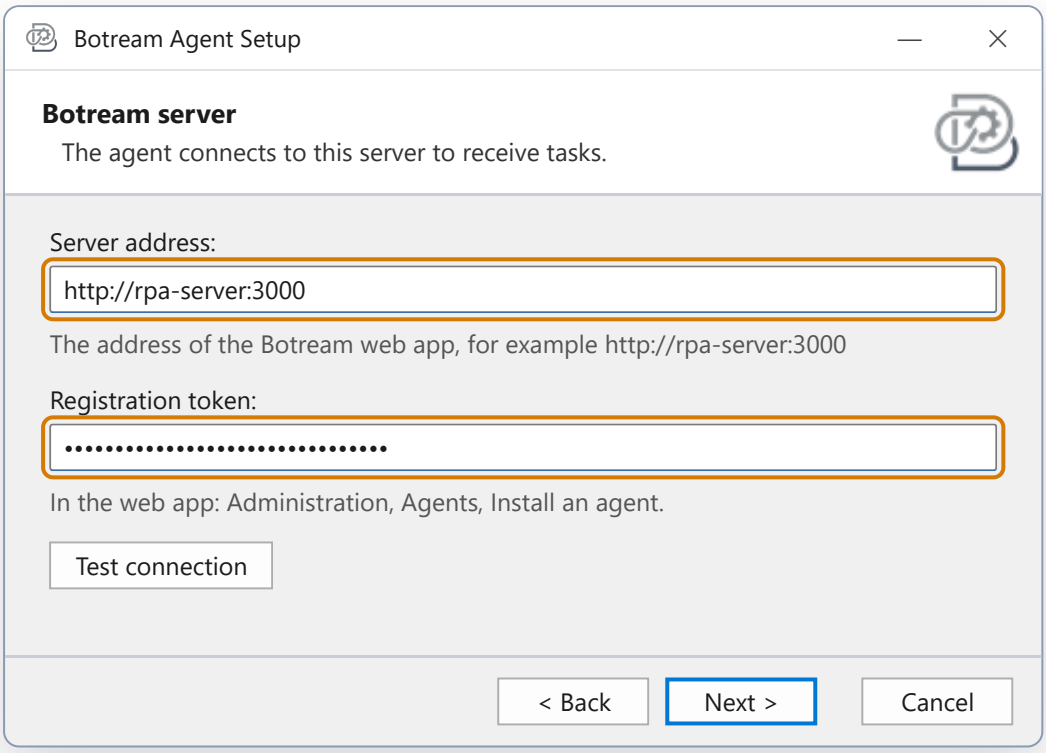
Wizard

Run the MSI on the agent machine:

1. **Welcome** — *Next*.
2. **Destination Folder** — Default: `C:\Program Files\Botream Agent`.

3. **Botream server**

- **Server address**: The address of the web app, for example `http://rpa-server:3000`.
- **Registration token**: The token from the page above.
- **Test connection** tries it; *Next* checks it as well.
- When you install again on a machine already registered with the same server, you can leave the token empty to keep the stored one.



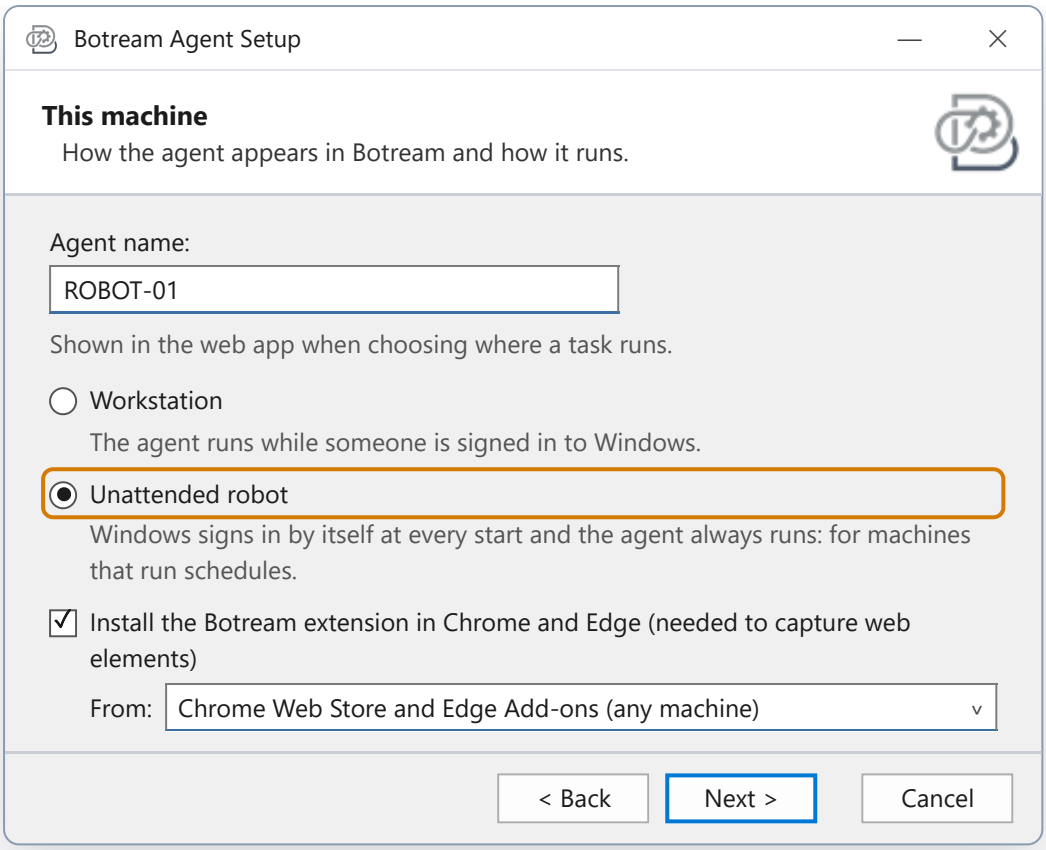
The Botream server page.

4. **This machine**

- **Agent name**: The name shown in the web app when choosing where a task runs.
- How it runs:

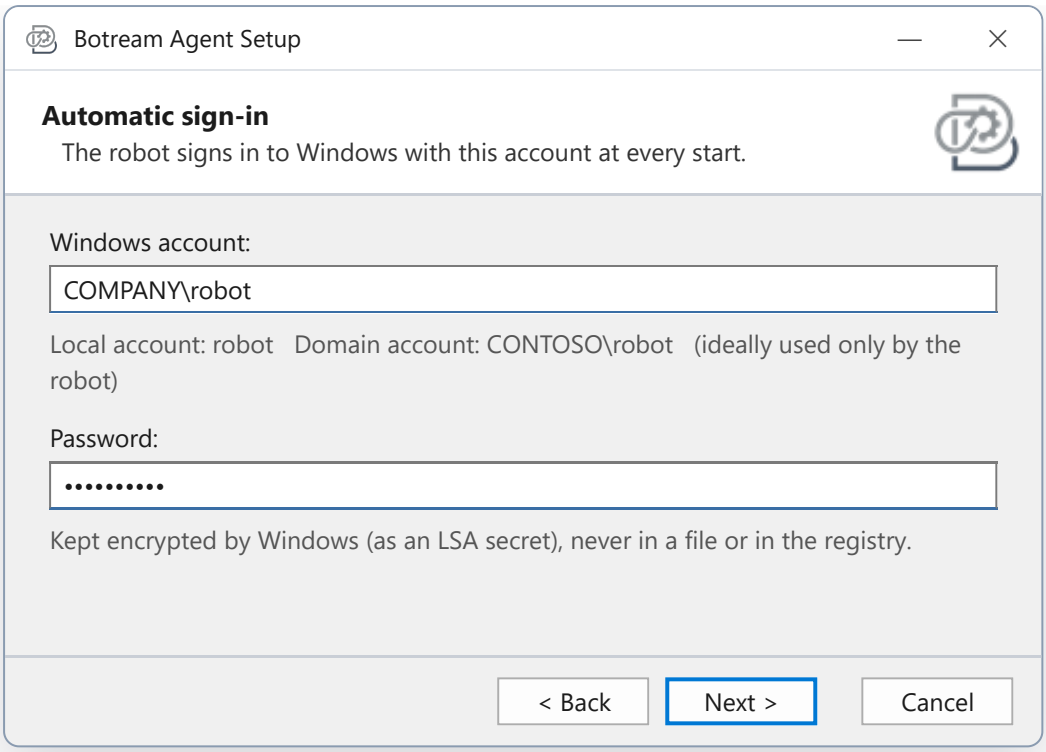
Option	Behavior
Workstation	The agent runs while someone is signed in to Windows. For task authors' computers: it takes no license seat and runs only what users who edit tasks start by hand, never schedules or triggers.
Unattended robot	Windows signs in automatically on every start and the agent runs all the time. For machines that run tasks for the business: it takes a **Runner** license seat and is the only kind that runs schedules and triggers.

- **Install the Botream extension in Chrome and Edge**: Needed to capture web elements; leave it checked.



The This machine page (here for a robot machine).

5. **Automatic sign-in** (only when *Unattended robot* is chosen)
   - **Windows account**: `robot` for a local account, `COMPANY\robot` for a domain account. Preferably an account used only by the robot.
   - **Password**: The account is verified with Windows before the installation. Windows keeps the password encrypted (LSA secret); it is not written to a file or the registry.



The Automatic sign-in page.

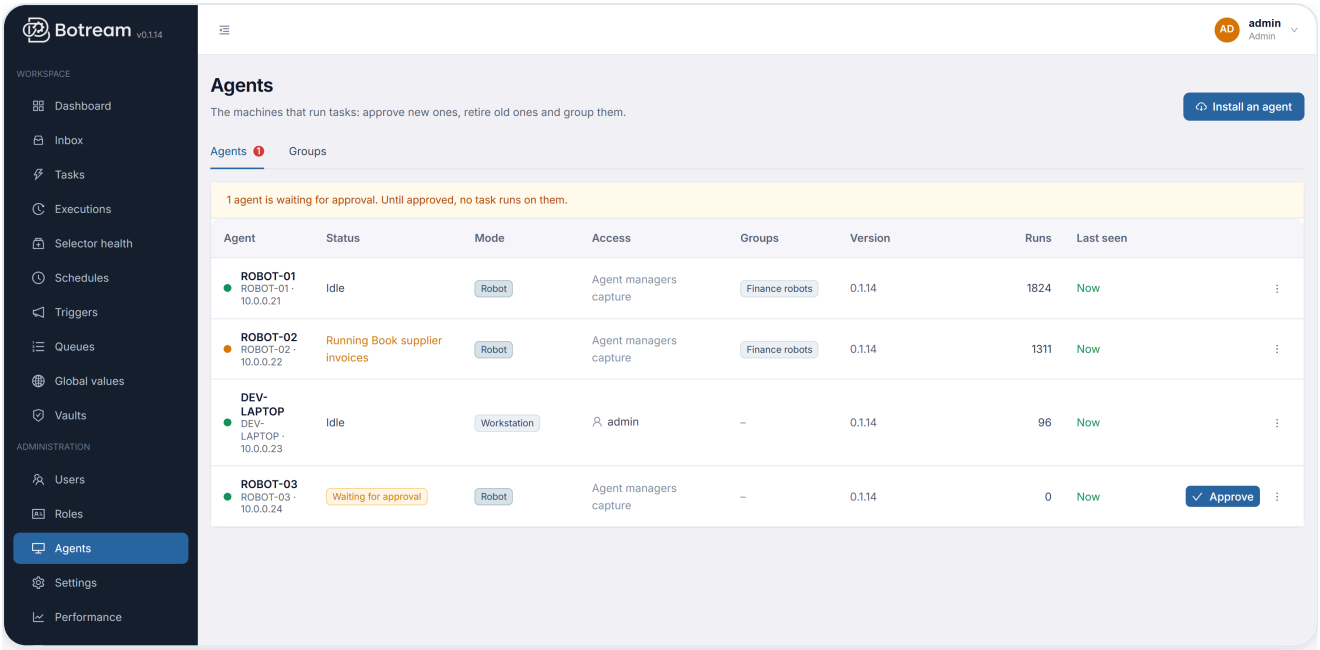
6. **Ready to install** — *Install*, then *Finish*.

After the installation the **BotreamAgent** service runs, and the agent starts on the signed-in user's desktop (in the system tray) and connects to the server. On robot machines, restart Windows to test the automatic sign-in.

> **Security.** Anyone who can reach the robot machine's screen gets to the robot account's desktop. Keep robot machines in a locked place or use them only through Remote Desktop. When a Remote Desktop session ends, the agent moves the desktop back to the console.

Approving the agent

If **Administration** → **Settings** → **Require approval for new agents** is on (the default), a new machine must be approved with **Approve** under **Administration** → **Agents** before it runs tasks. Until then its tray icon shows **Waiting for administrator approval**.

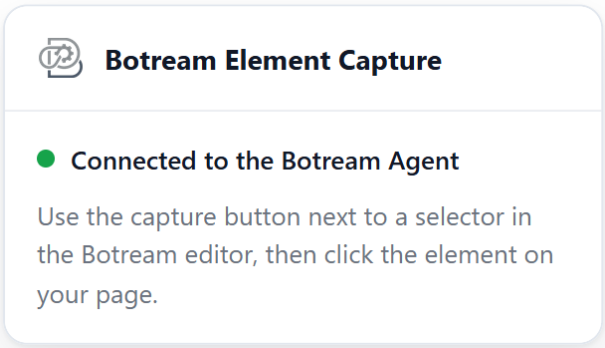


ROBOT-03 waits for approval.

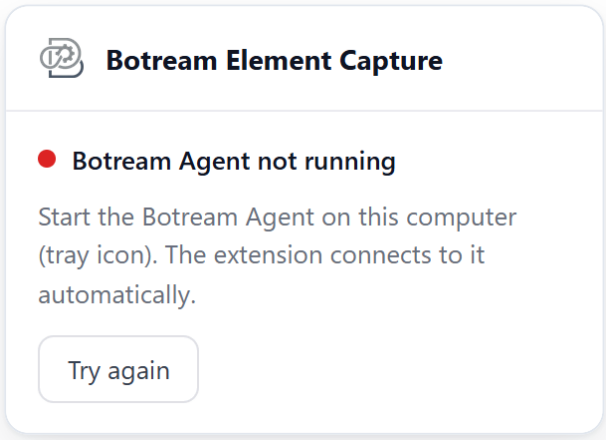
Browser extension

Setup adds the Botream extension to the forced extension policy of Chrome and Edge; the extension is installed from the Botream server (`<server>/extension/update.xml`). Browsers accept this only on **domain-joined or otherwise managed** machines. If the extension does not install itself on an unmanaged machine, it has to be loaded by hand in developer mode.

The extension's icon opens a window with the connection state:



Connected to the agent: ready to capture.



Start the agent, then Try again.

5 Silent (unattended) installation

In a command prompt opened as administrator:

Server

```
# Database chosen later, in the browser
msiexec /i Botream-Server-<version>.msi /qn PORT=3000

# SQL Server on this machine
msiexec /i Botream-Server-<version>.msi /qn SQLMODE=local [SQLINSTANCE=SQLEXPRESS]
[SQLDATABASE=Botream] [SQLUSER=.. SQLPASSWORD=..]

# SQL Server on another machine
msiexec /i Botream-Server-<version>.msi /qn SQLMODE=remote SQLSERVER=sql01 [SQLPORT=1433]
[SQLDATABASE=Botream] SQLUSER=.. SQLPASSWORD=.. [SQLTRUSTCERT=0]
```

With `SQLMODE=local` and no `SQLUSER`, setup connects with the Windows account running the installation; that account must be sysadmin on the instance. After a silent installation, open `http://localhost:<port>` on the server to create the first administrator account.

Agent

```
msiexec /i Botream-Agent-<version>.msi /qn SERVER=http://rpa-server:3000 TOKEN=<token> [AGENTNAME=
<name>]
        [MODE=robot ROBOTUSER=.\robot ROBOTPASSWORD=<password>] [EXTENSION=0]
```

`EXTENSION=0` does not add the browser extension policy.

6 Updating

- **Server**: Run the new server MSI over the existing installation. The port, the database connection and the settings are kept; pending database updates are applied automatically when the server starts.
- **Agents**: Update automatically. The BotreamAgent service asks the server every 30 minutes; if the server has a newer agent package and no task is running, it downloads the package, verifies its integrity and the Botream build's signature, and installs it silently. Settings and the agent identity are kept. A new server MSI also contains the agent package; to update only the agents, upload the new agent MSI together with its signature file (`Botream-Agent-<version>.msi.sig`, made by the same build) under **Administration** → **Agents** → **Install an agent** → **Upload a newer version** (or copy both files into `<server installation folder>\web\downloads`). Packages without a valid signature are not offered to agents. From 0.1.10 the browser extension has a new id: installing the agent update replaces the old extension in Chrome and Edge.
- Automatic updates can be turned off under **Administration** → **Settings** → **Update agents automatically**. The Agents list marks agents that are behind.
- To update an agent by hand, run the new MSI on the machine; the saved settings are kept.

A package with the same version number (a rebuild) installs over the installed one and replaces it; settings, the database and the agent identity are kept. Agents, however, only update themselves to a **higher version number**: install a package with the same number on the agent machines by hand.

7 Uninstalling

Botream Server or *Botream Agent* is removed under **Settings** → **Apps** (or Control Panel → Programs and Features).

- When the **server** is removed, its service and firewall rule are deleted. The `C:\ProgramData\Botream\Server` folder (settings and logs) and the SQL database are **not deleted**; a reinstallation finds the settings. The license state (`HKLM\SOFTWARE\Botream\Server\License`) is kept as well.
- When an **agent** is removed, its service, the browser extension policy and the automatic sign-in set up by the installation are removed. The agent settings (`C:\ProgramData\Botream\agent.json`) and the machine's agent identity (`C:\ProgramData\Botream\identity.dat`) are kept.

8 File and service locations

What	Where
Server program	`C:\Program Files\Botream Server`
Server settings and logs	`C:\ProgramData\Botream\Server` (logs roll daily and are kept for 14 days)
Server service	**BotreamServer** (Local Service account, starts automatically)
Agent program	`C:\Program Files\Botream Agent`
Agent settings	`C:\ProgramData\Botream\agent.json`
Agent identity	`C:\ProgramData\Botream\identity.dat` (only SYSTEM and administrators can open it)
Agent service logs	`C:\ProgramData\Botream\logs\agent-service-*.log`
Agent service	**BotreamAgent** (Local System account, starts automatically)

9 Troubleshooting

Symptom	Likely cause and fix
The setup page does not open from another computer	The first-run setup only works in the server's own browser: open `http://localhost:<port>` on the server.
The web app cannot be reached from the network	Check that the **BotreamServer** service is running and that the chosen port is open in the firewalls in between.
The SQL connection test fails in the wizard	Check that TCP/IP and SQL Server authentication are on, that the port is right and that the login may create databases.
The server starts but sign-in fails / shows errors	Look at the logs under `C:\ProgramData\Botream\Server`; if SQL Server is not up yet, the service retries by itself.
"No agent is online" / the agent does not connect	The server address or the registration token is wrong, or the agent is waiting for approval. The tray icon's tooltip and the agent window show the reason.
The agent does not appear in the tray	Check that the **BotreamAgent** service is running. If the user closed the agent, it starts again at the next sign-in; it can also be opened with the **Botream Agent** shortcut in the Start menu.
Scheduled tasks do not run	The scheduler runs inside the server. **Administration** → **System health** shows its state and the last error. Make sure the target machine was installed as an *Unattended robot*.
Element capture does not work	Check that the Botream extension is installed in the browser (see *Browser extension*).

If agents reach the server over untrusted networks, publish Botream behind HTTPS.