

# UiPath Forms

## What is UiPath forms?

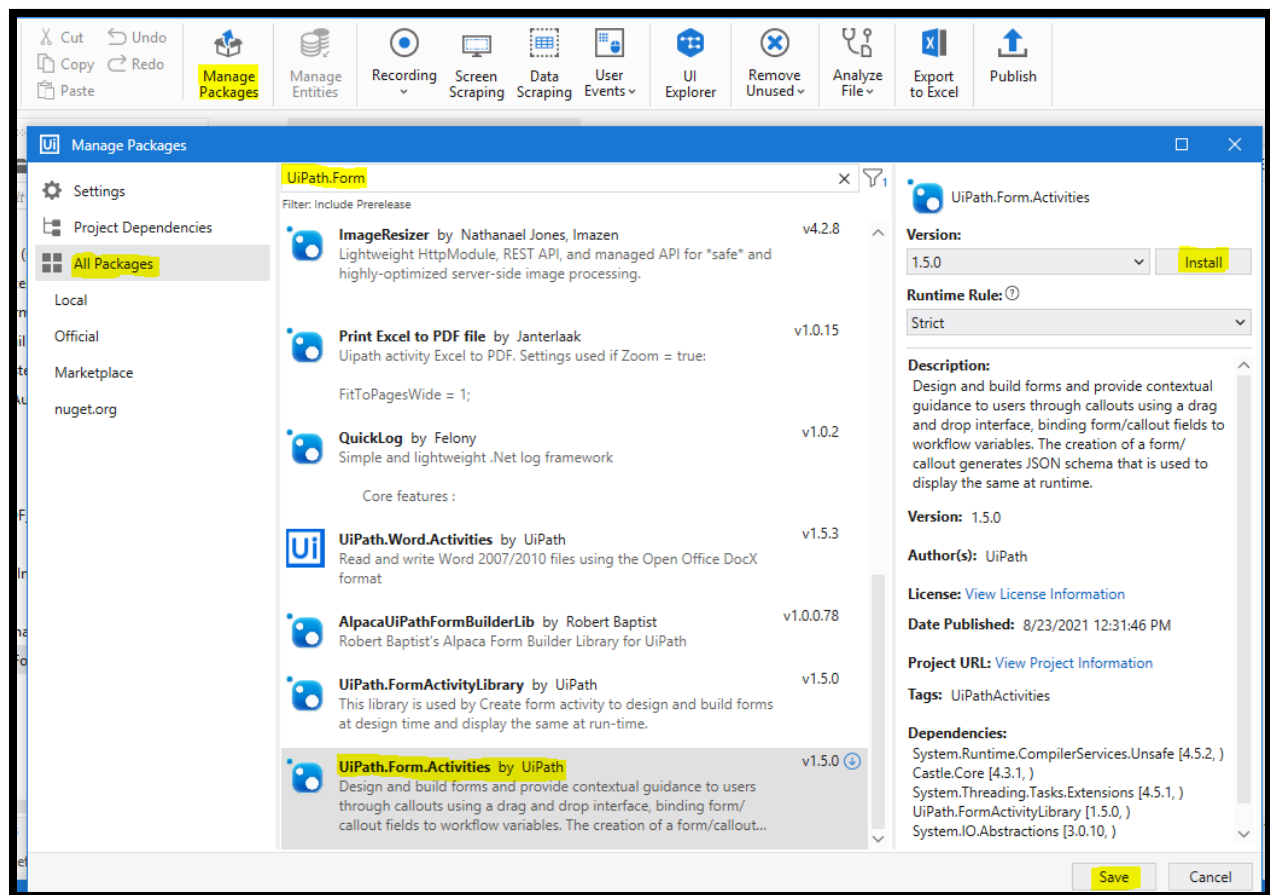
Attended robots help human workers speed up front-office tasks triggered by user commands or needing human directions. UiPath Forms are **key to enabling human intervention, validation, and interaction with the robot process.**

## Step1

Open UiPath Studio and create one new process


First Install UiPath.Form.Activities n Studio

Go to Manage Package→All Package→Search UiPath.Form.Activities install and Save



## Form Activities in UiPath

### Forms

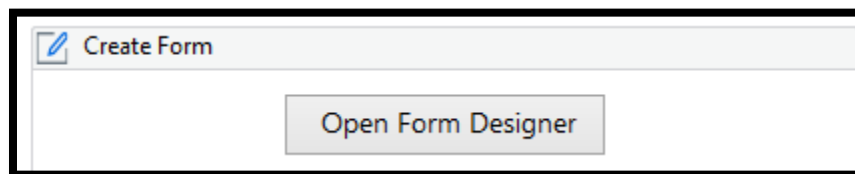
 Create Form

 Start Form Activity

### Using UiPath Form Writing Data into Excel

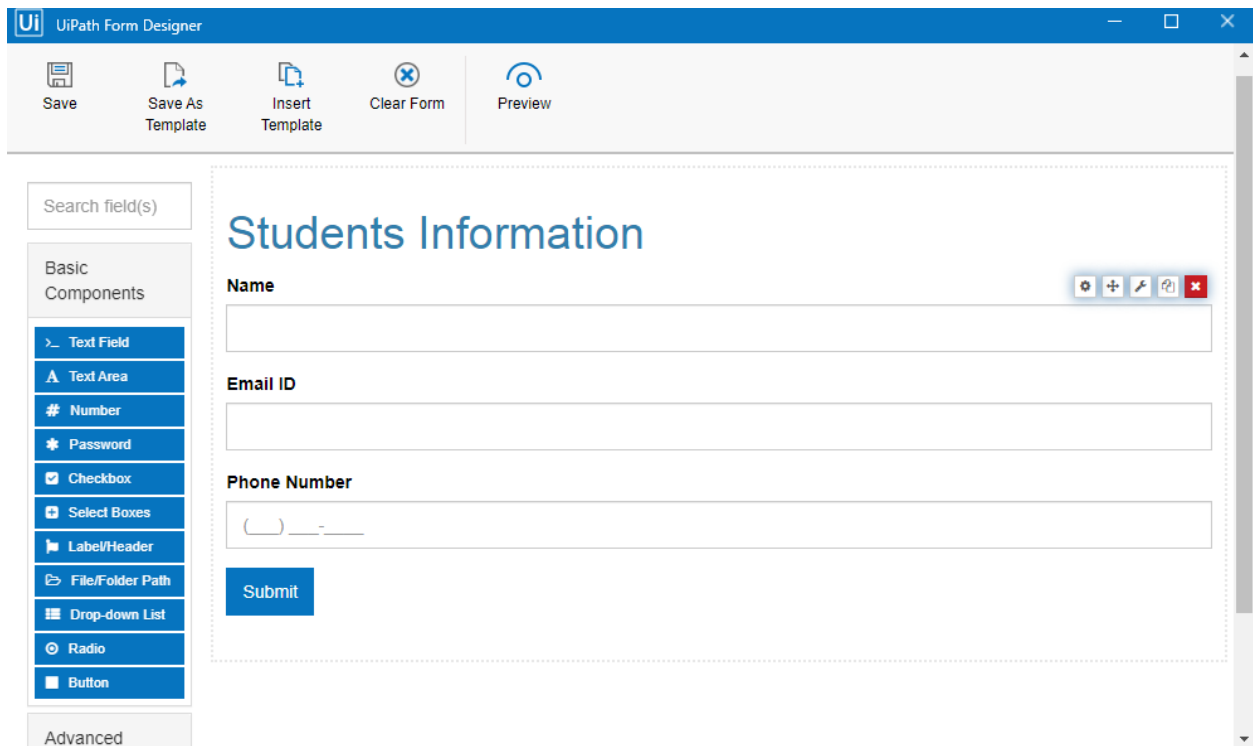
#### Step1

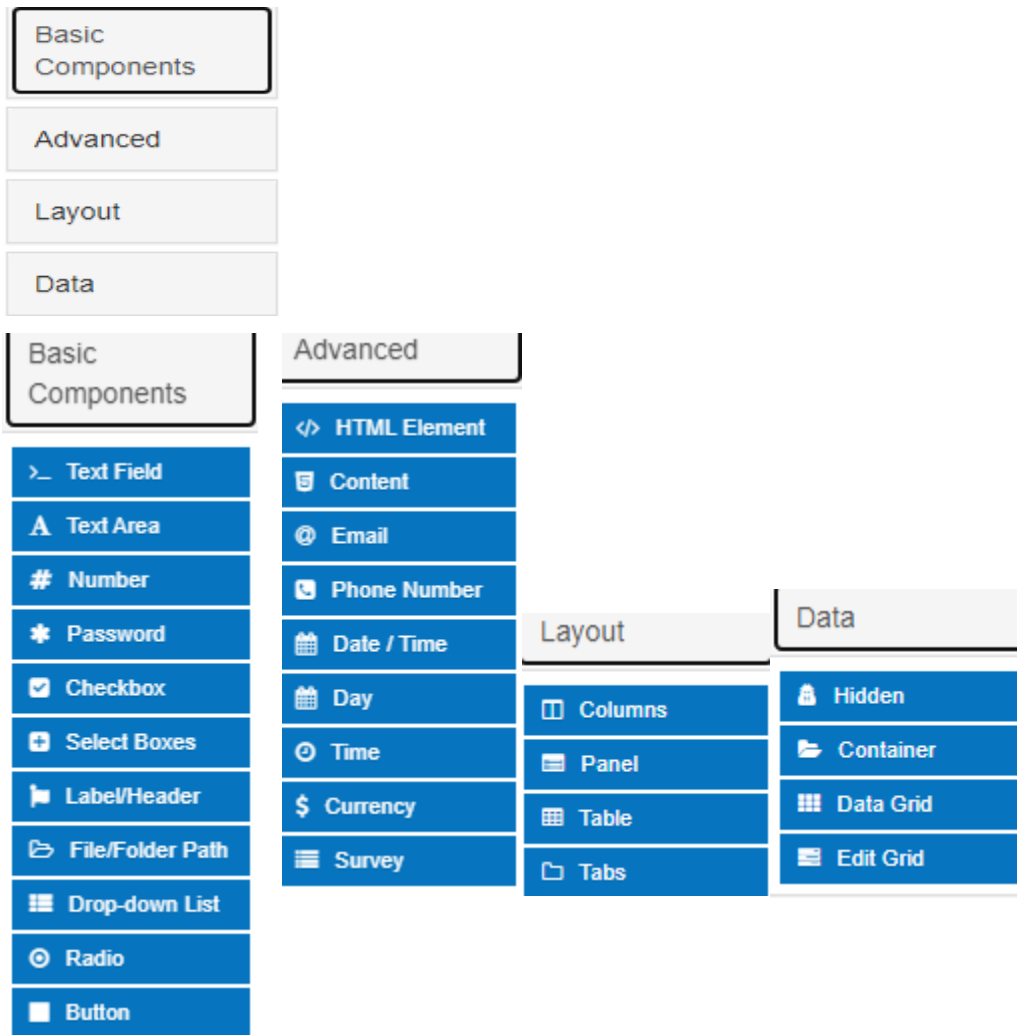
Drag and Drop Create Form Activity From Activity Panel to Designer Panel in order to create a custom Form



Once I Click on Open Form Designer the below Pop Up will Appear

The form you configure retrieves all the data the end user inputs and stores it in variables which can be further used in the automation process.

A screenshot of the UiPath Form Designer application window. The title bar says 'UiPath Form Designer'. The menu bar includes 'Save', 'Save As Template', 'Insert Template', 'Clear Form', and 'Preview'. The main workspace shows a form titled 'Students Information'. On the left is a 'Basic Components' panel with a search field and a list of components: Text Field, Text Area, Number, Password, Checkbox, Select Boxes, Label/Header, File/Folder Path, Drop-down List, Radio, and Button. The form itself has three input fields: 'Name', 'Email ID', and 'Phone Number'. The 'Phone Number' field has a placeholder '( ) - -'. Below the fields is a blue 'Submit' button. There are also small icons for settings, zoom, and other functions near the top right of the form.



we can drag and drop this components and create the form based on our requirement

In my senario I have drag and drop the Text Field,Email Id ,Phone Number

Once I Drag and Drop Text Field

**Text Field Component**

Display | Data | Validation | Field Key | Conditional

Logic

Label \*

Text Field

Label Position

Top x ▾

Placeholder

Placeholder

Description

1

Tooltip

1

Preview

Text Field

Save Cancel Remove

here we have several options we can make use of it and we can design our custom design form

Data:

Here we can give default value to our Text field

Condition:

Here we can give condtion to our Text Field

Field Key:

This generated automatically and this very much used in our workflow that we create

Drag and Drop Email Component and save by giving conditions and logic based upon our requirement

**Email Component**

Display | Data | Validation | Field Key | Conditional

Logic

Label \*

Email

Label Position

Top x ▾

Placeholder

Placeholder

Description

1

Tooltip

1

Preview

Email

Save Cancel Remove

Drag and Drop PhoneNumber and save by giving conditions and logic based upon our requirement

## Phone Number Component

Display

Data

Validation

Field Key

Conditional

Logic

Label \*

Phone Number

Label Position

Top

Description

1

Tooltip

1

Prefix

Preview

Phone Number

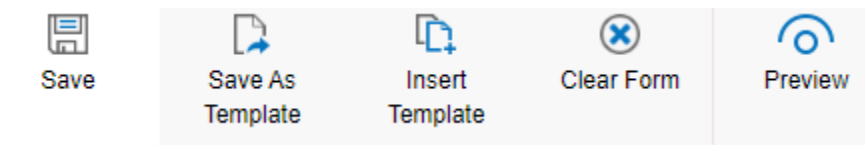
( ) \_ - \_

Save

Cancel

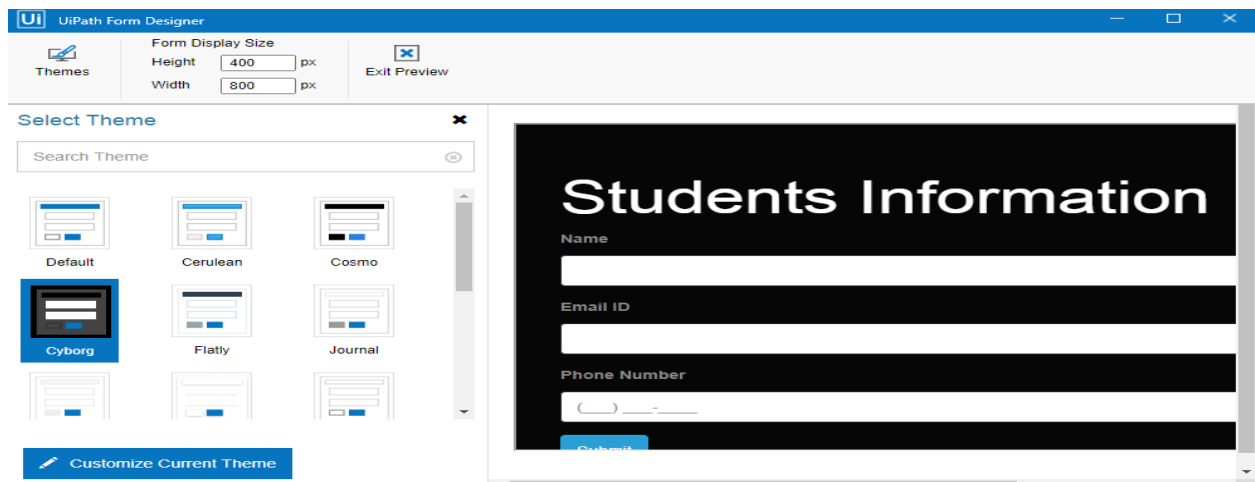
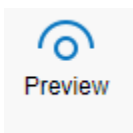
Remove

Save the form After creating



Once you click on Preview button in UiPath Form Design

Here we can give themes to our Form and exist Preview



## Properties of this activity

Properties

UiPath.Form.Activities.FormActivity

Common

DisplayName

Create Form

ExecuteDoBlockFirst

☐

FormTitle

The title giv...

...

Isolated

☐

Timer

Duration (ir...

...

Data Bindings

FormFieldsCollection

"(Collection)"...

...

GenerateInputFields

☒

Data Table

MaxColumnsForSche...

6...

...

Format

DisableMaximize

☐

DisableMinimize

☐

FormHeight

400...

...

FormWidth

800...

...

IsReadOnly

☐

LocalCSSFilePath

Used to cus...

...

WindowPositionX

Starting pos...

...

WindowPositionY

Starting pos...

...

Input

FormFieldsInputData

If a field is p...

...

Misc

Private

☐

Output

Dismissed

Dismissed v...

...

FormFieldsOutputData

JSON data...

...

SelectedButton

Is used to ia...

...

Start Form

Folder Path

Relative Fol...

...

Form Name

Create Form...

...

## Format

The properties used for form appearance and format of Form

- **DisableMinimize** (Boolean)—To deactivate the Minimize and Restore buttons on forms, check this box. By default, the checkbox is cleared (set to false).
- **DisableMaximize** (Boolean)—To deactivate the Maximize and Restore buttons on forms.
- **FormHeight** (Int32)—Sets the desired height for the form, in pixels. The default height is 400.
- **FormWidth** (Int32)—Sets the desired width for the form, in pixels. The default width is 800.
- **IsReadOnly** (Boolean)—To prevent form fields from being edited, check this box. Fields marked as Always Enabled are not affected by this option.
- **WindowPositionX** (Int32)—Sets the form left margin position, in pixels.
- **WindowPositionY** (Int32)—Sets the form top margin position, in pixels.

## Data Table

The property in this category refers to table data in forms.

- **MaxColumnsForSchemaGeneration** (Int32)—Sets the maximum number of generated columns for DataTable schemas. The default values is 6.

## Data Bindings

The properties refer to data that is linked to the automation process.

- **FormFieldsCollection** (Dictionary<String, Argument>)—Binds workflow variables to the form Field Keys. Use **In** or **In/Out** directions for input form fields. Use **Out** or **In/Out** directions for output form fields. For example, in the **Name** field add the string First Name, set the **Direction** to In/Out, and set the **Type** to String.

Name	Direction	Type	Value
Name	Out	String	var_Name
Email	Out	String	var_Email
phoneNumber	Out	Int32	var_PhoneNumber

**GenerateInputFields** (Boolean)—To add the fields defined in the collection to the form

## Input

The property in this category refers to the JSON input data.

- **FormFieldsInputData** (String)—Passes JSON input data to the form and overwrites the values defined in the **FormFieldsCollection** field. For Data Grid components, structure the JSON as an array.

## Misc

The property in this category refers to miscellaneous settings.

- **Private** (Boolean)—To skip logging variables and arguments at Verbose level, check this box. By default, the checkbox is cleared (set to false).

## Output

The properties in this category refer to the output object data.

- **Dismissed** (Boolean)—Outputs true when the end user closes the form without providing any input.
- **FormFieldsOutputData** (String)—The JSON data that results from the form upon completion.
- **SelectedButton** (String)—Outputs the form UI elements the end user interacted with.



## Start Form

The properties in this category bind the form to the Start Form Activity, so the form can be opened in the background.

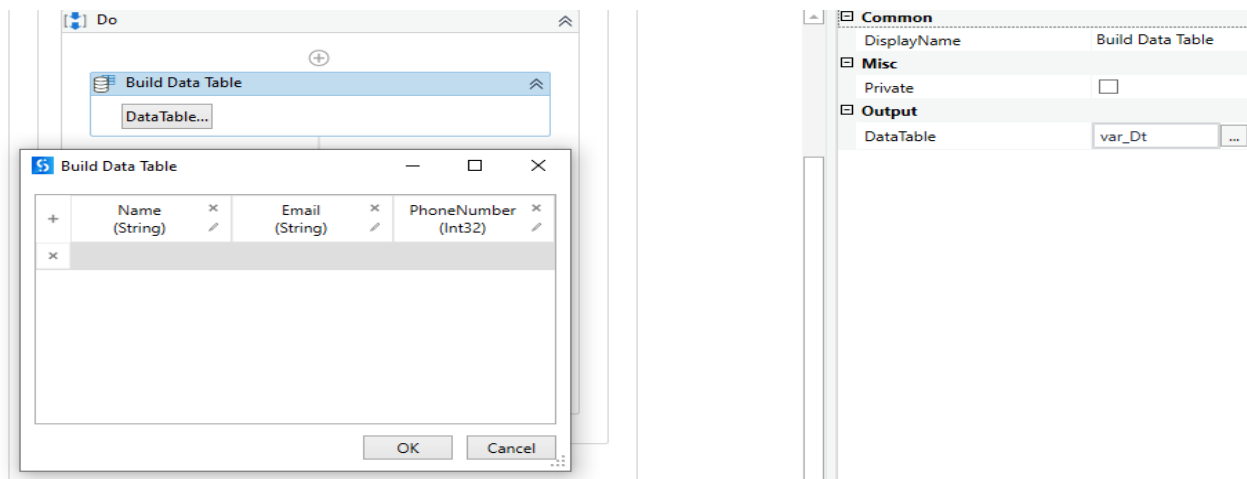
**Folder Path** (String)—Enter the path where you want to save the form data to.

**Form Name** (String)—Enter a name for your form data.

To bind every Create Form to the corresponding Start Form Activity, the Folder Path and Form Name values must match with the values set in Start Form Activity

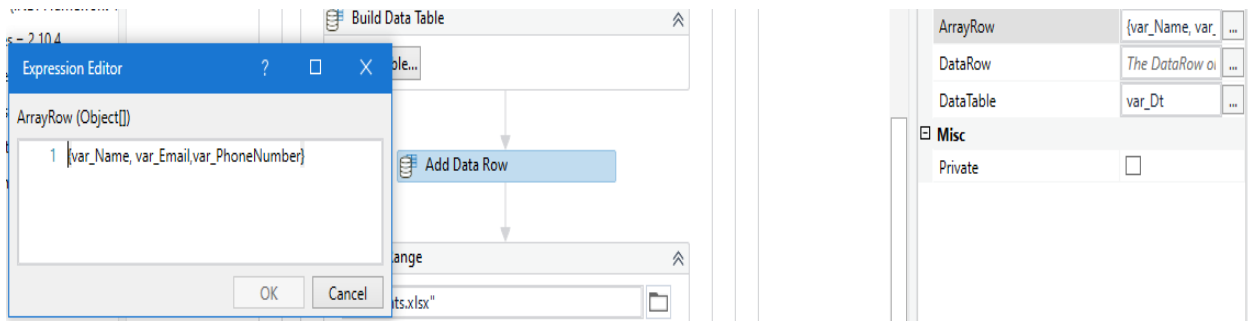
### Step2

Drag and drop build data table and store data in the var\_Dt



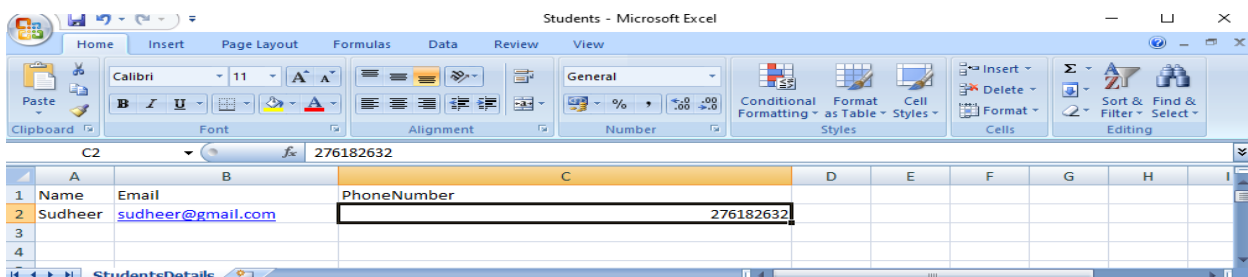
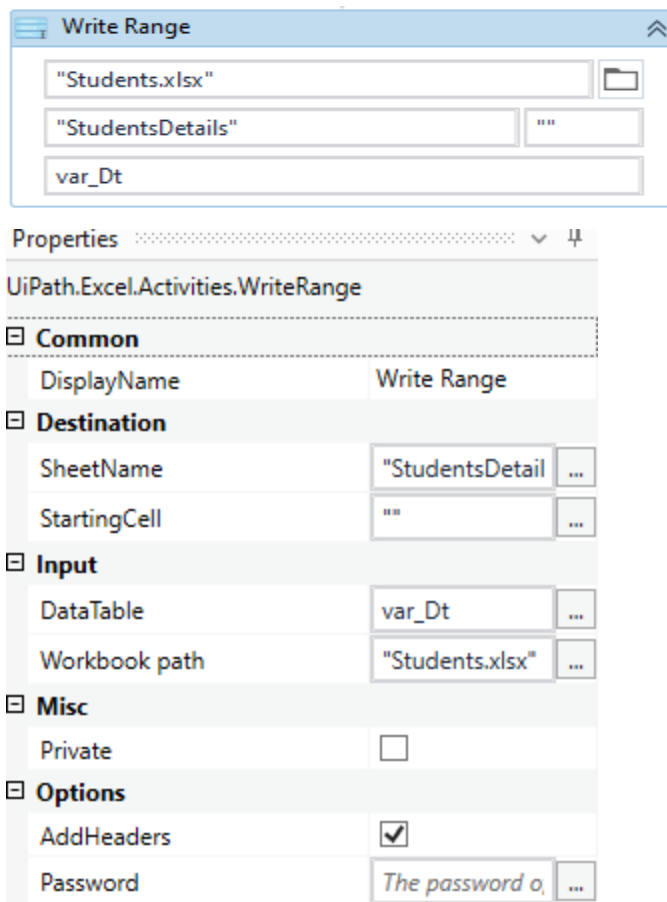
### Step3

Drag and drop add data row in the Array row property pass the variables which we created



## Step4

In order write data I have use write range to write my data in excel



## Employee Management System Using UiPath Form

First Drag and drop Create Form Activity → Click on Open From Designer

Drag and drop label and /Header Component Give the Content, Label Size and save

The screenshot shows the 'Label/Header Component' configuration window. It has a 'Display' tab and a 'Field Key' tab. The 'Label Size' dropdown is set to 'Header - High'. The 'Refresh On Change' checkbox is checked. The 'Content' list contains one item: 'Employee Management System'. To the right is a 'Preview' window showing the text 'Employee Management System' in a large, blue, sans-serif font. At the bottom are 'Save', 'Cancel', and 'Remove' buttons.

Drag and Drop Text Field, label name as Employee First Name, In validation click the check box Required, Minimum Length 2, Maximum Length 40 and save

The screenshot shows the 'Text Field Component' configuration window. It has tabs for 'Display', 'Data', 'Validation', 'Field Key', and 'Conditional'. The 'Validation' tab is selected. The 'Label' field is set to 'Employee First Name'. The 'Label Position' dropdown is set to 'Top'. The 'Placeholder' field is set to 'Placeholder'. The 'Description' and 'Tooltip' fields are empty. To the right is a 'Preview' window showing a text input field with the label 'Employee First Name \*' and a red asterisk indicating it is required. At the bottom are 'Save', 'Cancel', and 'Remove' buttons.

Drag and Drop Text Field, label name as Employee Last Name, In validation click the check box Required, Minimum Length 2, Maximum Length 40 and save

## Text Area Component

Display

Data

Validation

Field Key

Conditional

Logic

Label <sup>?</sup>

Employee Last Name

Label Position <sup>?</sup>

Top

Placeholder <sup>?</sup>

Placeholder

Description <sup>?</sup>

1

Rows <sup>?</sup>

3

### Preview

Employee Last Name \*

Save

Cancel

Remove

Drag and Drop drop down Component in Display→label name as Position ,In Data →Data Source Values in label →HR,Manager,Operation,Finance,Admin,Consultant

Display

Data

Validation

Field Key

Conditional

Logic

☐ Multiple Values <sup>?</sup>

Default Value <sup>?</sup>

Default Value

Data Source Values <sup>?</sup>

	Label	Value	
≡	HR	hr	⊕
≡	Manager	manager	⊕
≡	Operation	operation	⊕
≡			⊕

### Preview

Position

Save

Cancel

Remove

Drag and Drop Day component ,In validation click required day,required month,required year and save

## Day Component

Display

Day

Month

Year

Validation

Field Key

Conditional

Logic

Label \*

DOB

☐

Hide Input Labels ?

Inputs Label Position ?

Top

Description ?

1

Tooltip ?

1

Custom CSS Class ?

### Preview

DOB

Month \*

Day \*

Year \*

Save

Cancel

Remove

Drag nad drop Radio Component ,In Display→Label name as gender→In Data→values→give label male and female and save

## Radio Component

Display

Data

Validation

Field Key

Conditional

Logic

Default Value ?

☐ Male

☐ Female

Values ?

	Label	Value *	Shortcut ?	
≡	Male	male *	▼	⊕
≡	Femak	female*	▼	⊕

+ Add Another

### Preview

Gender \*

☐ Male

☐ Female

Save

Cancel

Remove

Drag and Drop Phone Number component In Display give label name,prefix as 91,In validation click required and save

## Phone Number Component

Display

Data

Validation

Field Key

Conditional

Logic

Label ⓘ \*

Contact Number

Label Position ⓘ

Top

Description ⓘ

1

Tooltip ⓘ

1

Prefix

+91

Preview

Contact Number \*

+91 ( ) -

Save

Cancel

Remove

Drag and Drop Select Boxes Component, In Data → values give permanent and contract

## Select Boxes Component

Display

Data

Validation

Field Key

Conditional

Logic

Label ⓘ \*

Permanent/Contract

Label Position ⓘ

Top

Description ⓘ

1

Tooltip ⓘ

1

Custom CSS Class ⓘ

Preview

Permanent/Contract

☐ Permanent

☐ Contract

Save

Cancel

Remove

Drag and drop Email Component and give Sufix as @gmail.com and save

Display

Data

Validation

Field Key

Conditional

Logic

Label ⓘ \*

Email

Label Position ⓘ

Top

Placeholder ⓘ

Placeholder

Description ⓘ

1

Tooltip ⓘ

1

Preview

Email \*

@gmail.com

Save

Cancel

Remove

Drag and drop Currency Component ,In Display label name as Salary and Sufix as INR and save

**Currency Component**

Display | Data | Validation | Field Key | Conditional

Logic

Label \*  
Salary

Label Position  
Top

Placeholder  
Placeholder

Description  
1

Tooltip  
1

Preview

Salary \*  
INR

Save Cancel Remove

Drag and Drop Button Component in display put label name as submit

**Button Component**

Display | Field Key | Conditional | Logic

Label \*  
Submit

Action  
Submit

☐ Reset Data from DO block

Theme  
Primary

Size  
Medium

☐ Block Button

Left Icon

Preview

Submit

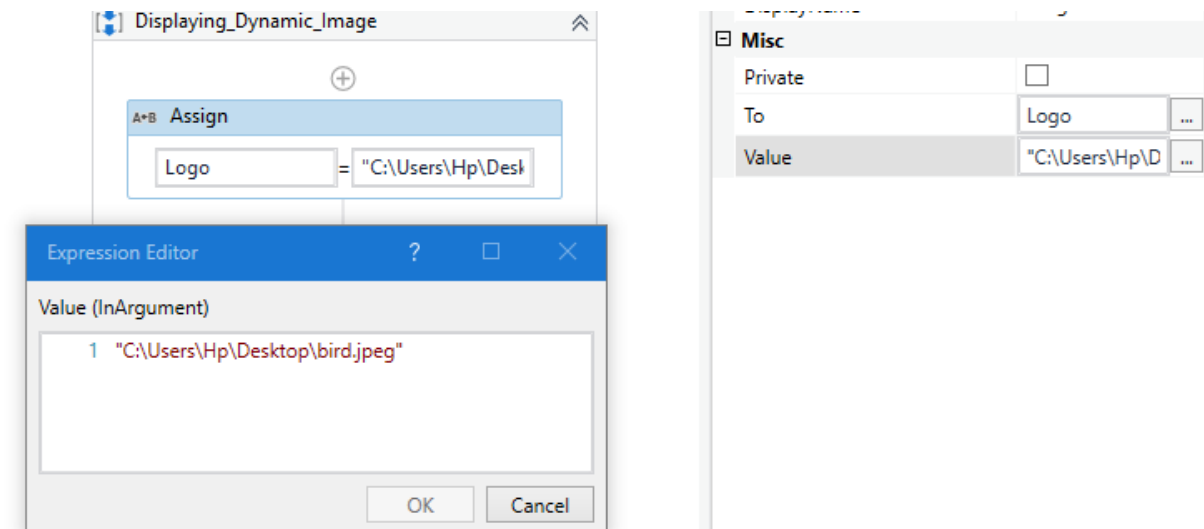
Save Cancel Remove

Using Components in open form designer we can design forms in UiPath

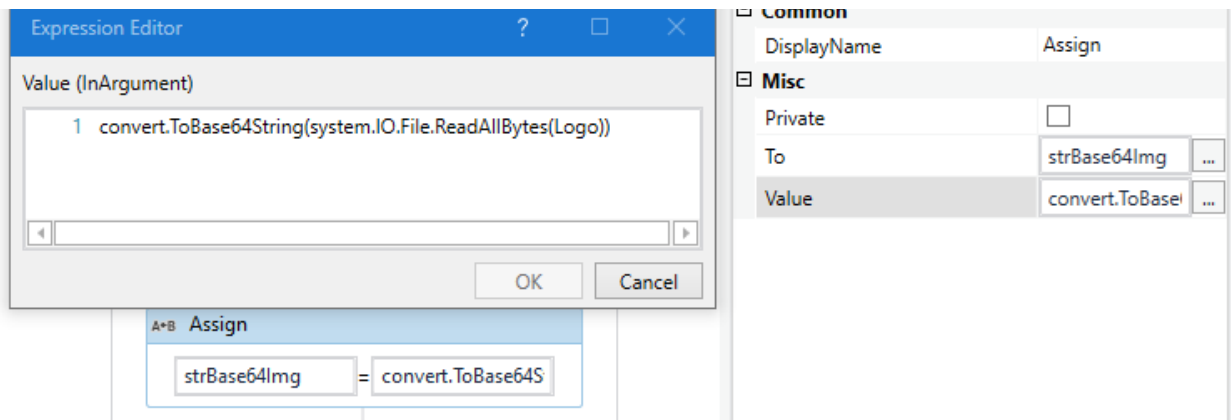
## Dynamic image Displaying

Create the Process and name it as Displaying\_Dynamic\_Image Using UiPath Forms

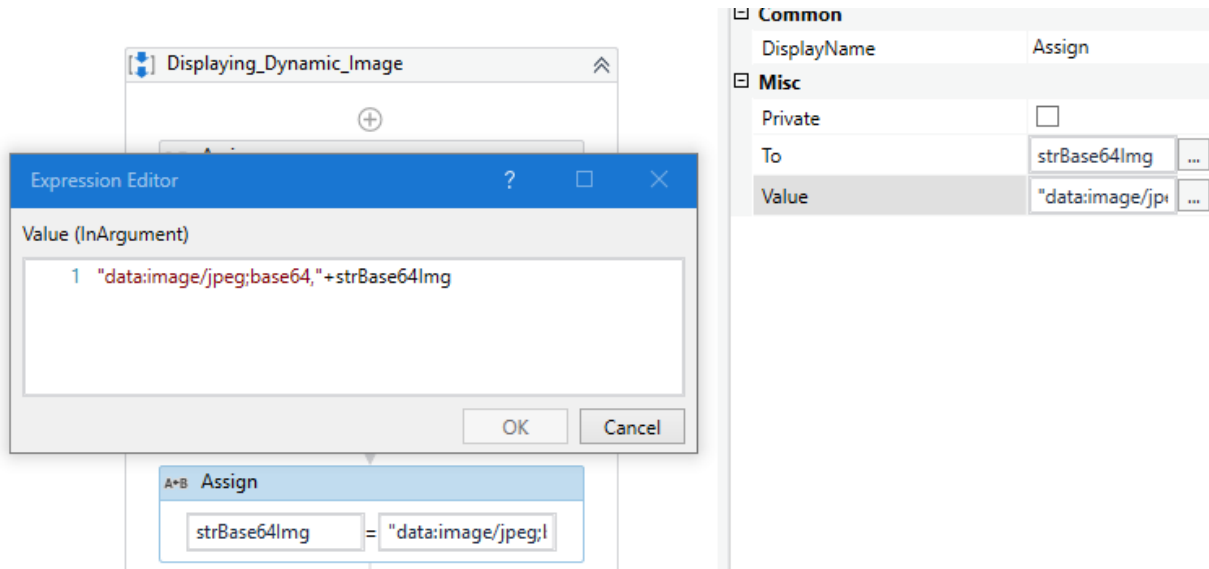
Take the Assign activity and store the URL of image by creating the variable



Convert that image into Base64String and read that image

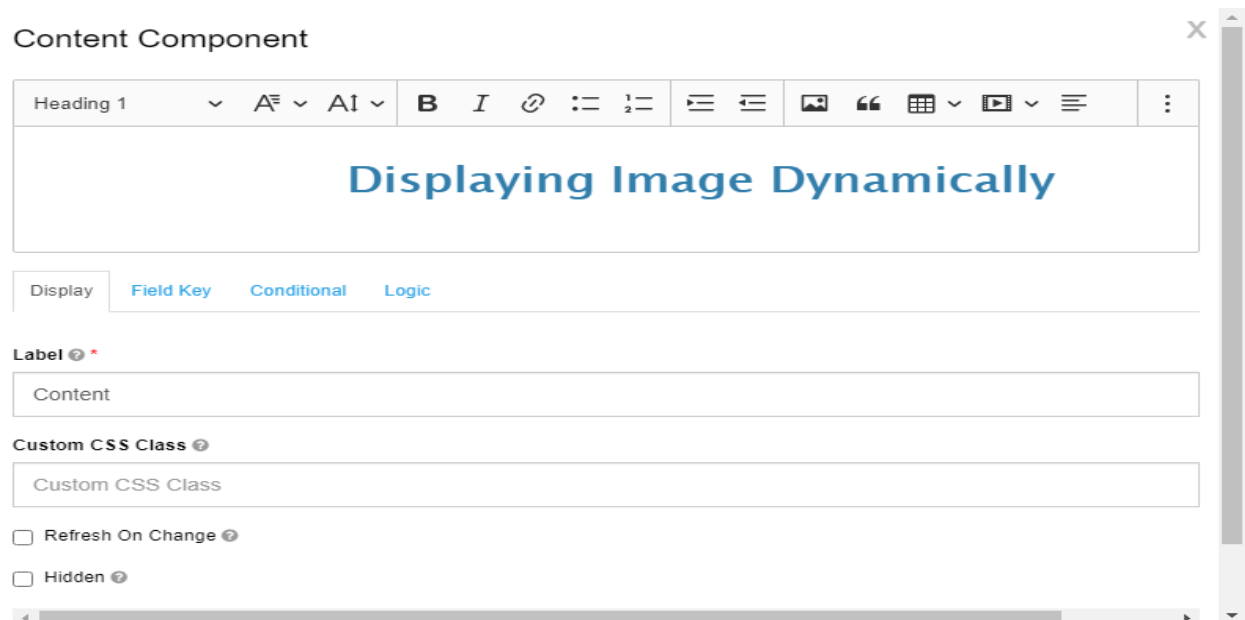


Format of image



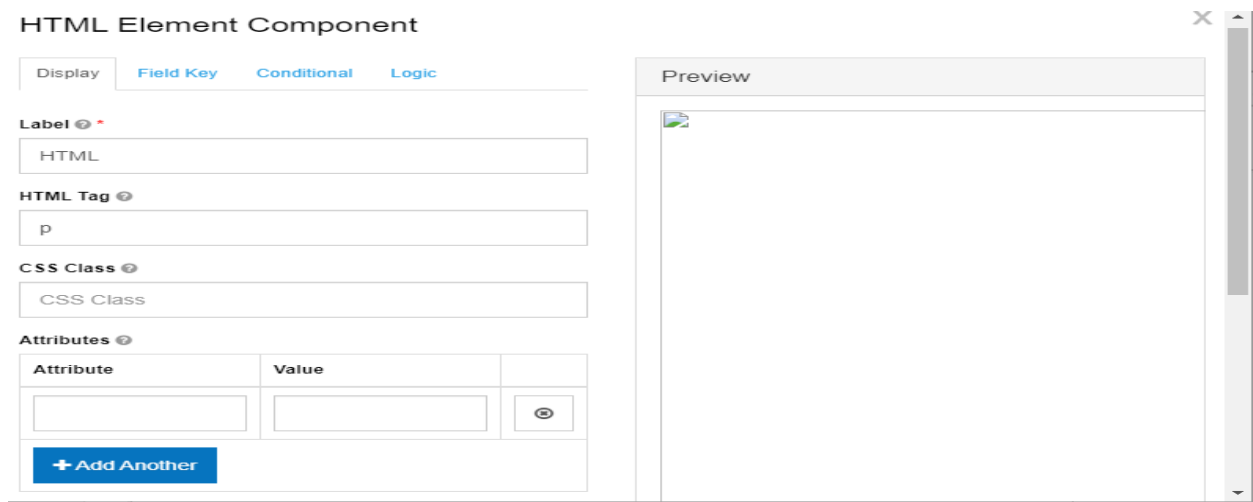


Drag and drop create form activity and click on open design Form and Drag and Drop content Component and give Display name as Display image Dynamically and save



The screenshot shows the 'Content Component' configuration window. At the top, there is a heading 'Heading 1' and a rich text editor toolbar. The main content area displays the text 'Displaying Image Dynamically' in a large blue font. Below the content area, there are four tabs: 'Display', 'Field Key', 'Conditional', and 'Logic'. The 'Display' tab is selected. Under the 'Display' tab, there is a 'Label' field with the value 'Content', a 'Custom CSS Class' field with the value 'Custom CSS Class', and two checkboxes: 'Refresh On Change' and 'Hidden', both of which are unchecked.

Drag and Drop HTML Element Component and in content give  
 and save  
And copy the Field key



The screenshot shows the 'HTML Element Component' configuration window. It has four tabs: 'Display', 'Field Key', 'Conditional', and 'Logic'. The 'Display' tab is selected. The 'Label' field contains 'HTML', the 'HTML Tag' field contains 'p', and the 'CSS Class' field contains 'CSS Class'. Below these fields is an 'Attributes' section with a table for defining attributes. The table has three columns: 'Attribute', 'Value', and a checkbox. There is one row with empty fields for 'Attribute' and 'Value', and the checkbox is checked. Below the table is a blue button labeled '+ Add Another'. To the right of the configuration window is a 'Preview' window showing a small image icon.

In the property of form field collection give the html element component field key that argument is assign to strBase64Img variable in →In direction

FormFieldsCollection

Name	Direction	Type	Value
Logo1	In	String	strBase64Img

Create Argument

OK Cancel

The Output is

### Displaying Image Dynamically



**For any RPA implementation/resources in your organization please reach out to**  
**[rpa@gxplabs.com](mailto:rpa@gxplabs.com)**