



MyForm

MY FIRST FORM

Type a message

Message box content...

This message will appear on message box.

Message Box

Contact

Linkedin

Mateus Orlandin Dias

Purpose

UiPath Forms is a solution for attended automation, which is used to create forms that can be filled out by users. The form data can then be stored in an Excel file or other data storage options. UiPath Forms can be accessed through a web dashboard and is available to all users with access through a link. It is most suitably used for attended automation purposes, meaning it can only be accessed from the system where the RPA process is running.

Forms can also be used to help developers in the development process. For instance, a form can be created that requests a new key-value pair from the developer and automatically places it in the automation configuration file. This can help streamline the development process and reduce the time spent on manual tasks. Many other ideas that help developers can be realized with UiPath Forms, including some that have been presented at UiPath community events.

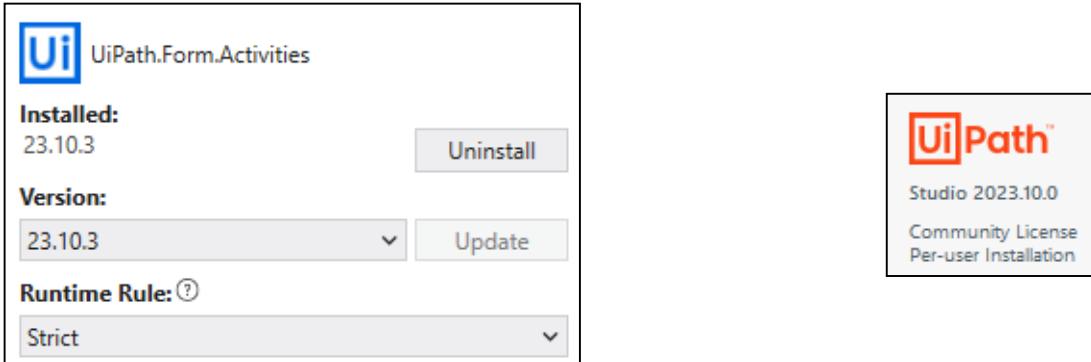
UiPath Form Activities

by Mateus Orlandin Dias



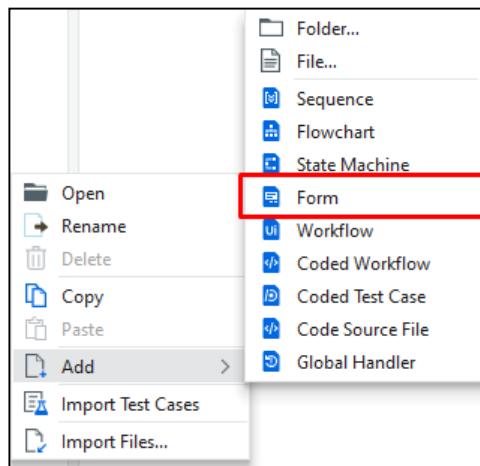
Prerequisites

- UiPath Studio version 2023.4 or higher;
- Package UiPath.Form.Activities version 2023.4 or higher;



How to create

- Right click on Project panel;
- Select "Form" option in "Add" dropdown. You will be redirected to Form Builder.



How to call form from workflow

A screenshot of the Main Sequence workflow. It contains a 'Show Form - My First Form' activity and a 'Run Local Triggers' activity. The 'Continue workflow execution' checkbox in the Show Form activity is checked ('On'). The Run Local Triggers activity has a descriptive note: 'This activity initialises and starts all local triggers that listen for events on the user's machine.'

- Use the 'Show form' activity;
- Pass the necessary arguments;

If you are using triggers:

- Use 'Run Local Triggers' after 'Show Form';
- Active 'Continue workflow execution' property.

A screenshot of the 'Arguments' configuration for the 'Show Form - My First Form' activity. It shows two arguments: 'typeAMessage' (String type, In direction) and 'linkedin' (System.Uri type, In direction). A note above the table says: 'Connect workflow variables with form fields.'



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Form Builder in UiPath Studio

The screenshot shows the UiPath Studio interface with the 'Components' tab selected. On the left, there's a tree view of available components under categories like Basic, Advanced, Layout, and Data. The main workspace displays a form titled 'MY FIRST FORM' with several components: a 'Text Field' labeled 'Type a message' containing 'Message box content...', a 'Message Box' button, a 'Contact' section with a 'Linkedin' field containing 'Mateus Orlandin Dias', and a 'Label/Header' component. The 'Properties' panel on the right shows settings for the form, including 'Title: MyForm', 'Width: 0 px', 'Height: 0 px', and 'Show in Taskbar: Yes'. The bottom navigation bar includes tabs for Project, Components, Snippets, and others.

Components

Using these components, we can assemble various types of forms. We can add HTML elements, add a data table, add buttons, define styles and much more.

Design

On this screen, we can see a preview version of the form, here we can arrange the components used in the desired design.

Components Options

This screenshot shows the 'Button Component' configuration dialog. It has tabs for Display, Field Key, Conditional, and Logic. Under Display, there's a 'Label' input set to 'Message Box' and an 'Action' dropdown set to 'event'. There are checkboxes for 'Show Validations' and 'Button Event'. Under Logic, there's a 'Theme' dropdown set to 'Success'. To the right, a preview window shows a green 'Message Box' button with 'Save' and 'Cancel' buttons below it.

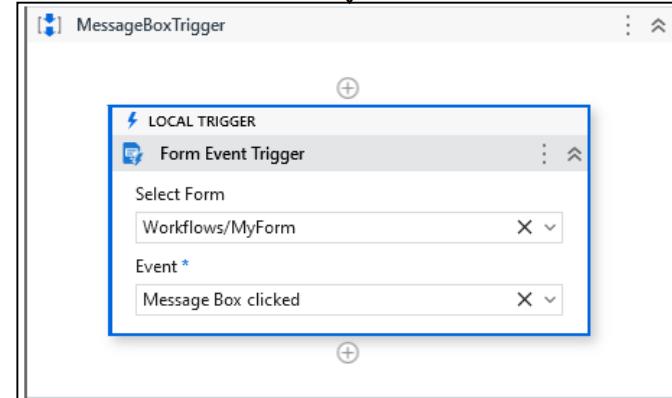
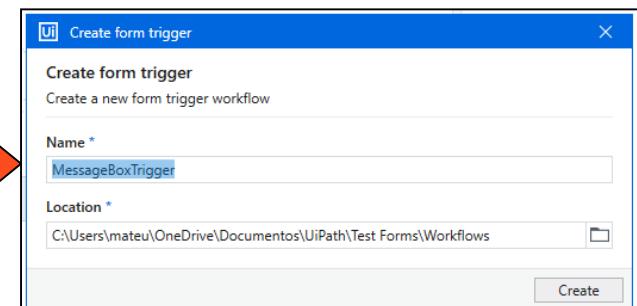
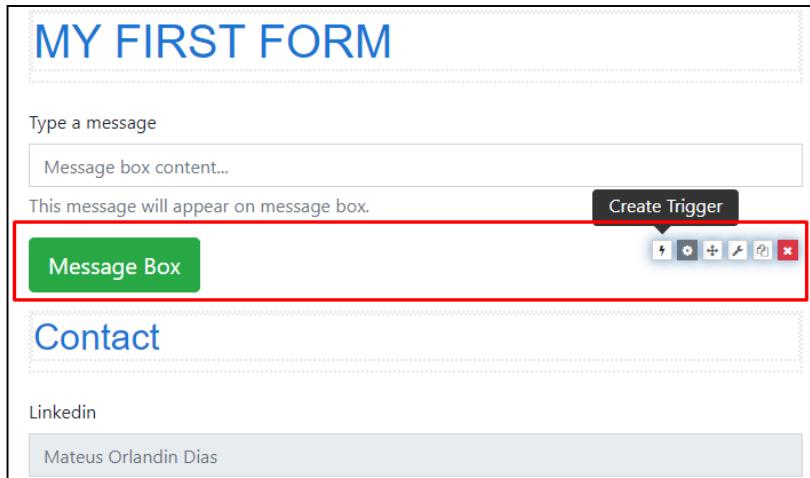
In the component options we can edit not only its look by customizing its CSS classes, but also its functionality by disabling/enabling the component and adding conditionals.



Form Triggers

You can create triggers which, when certain events occur on the form, capture the necessary arguments and pass them to the trigger workflow so that certain automation actions can be carried out.

Example: Let's create a Form Trigger from the click of the 'Message Box' button.

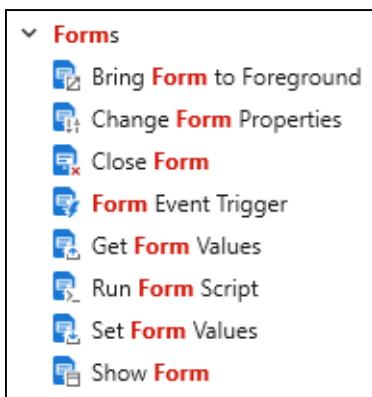


Trigger Workflow

From a trigger flow like this, it's possible to run part of an Attended automation or even build some interaction logic to help the developer automate a repetitive task.

When I click on the 'Message Box' button, my trigger flow will be automatically executed.

Other Forms interaction activities



These are some of the activities involved in interacting with UiPath Forms and they allow us to use values input by the user, set return values from the code for the user, close the form and much more.

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MY FIRST FORM

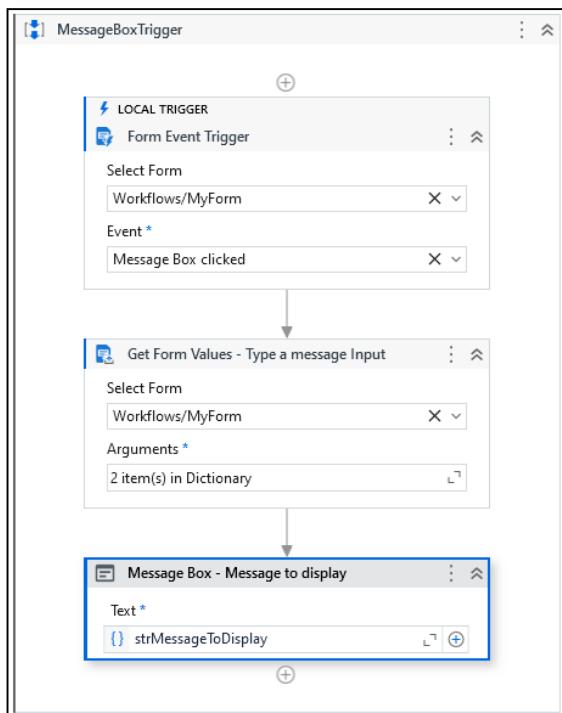
Given the context of the form and the trigger created, let's set up a logic so that when the 'Message Box' button is clicked, the user's input in the 'Type a message' field is captured and displayed in a message box.

Type a message

Message box content...

This message will appear on message box.

Message Box



Get Form Values arguments

Key	Type	Value
typeAMessage	String	{ strMessageToDisplay }
linkedin	System.Uri	{ Enter a VB expression }

Result

Type a message

Hello World!

This message will appear on message box.

Message Box

