

Robotic Process Automation Training using UiPath

Certification Project

edureka!

edureka!

© Brain4ce Education Solutions Pvt. Ltd.

Certification Project

Investment Report

StockExchange house is a mid-sized company that manages the investment of its clients. Its clients have exposure to various types of instruments such as Mutual funds, stocks, bonds etc.

The company is seeing a great deal of appreciation in its customer base; however, because of the increasing customer base, it is no longer able to cater to the specific demands of its customers.

The nature of the stock business is highly volatile; hence the company needs to send report of the stock prices to its customers many times in a day. The company is planning to create an automation process that will fetch stock prices from <https://www.nasdaq.com/market-activity/stocks> website and send the report to its customers.

You are required to automate this entire process using UiPath.

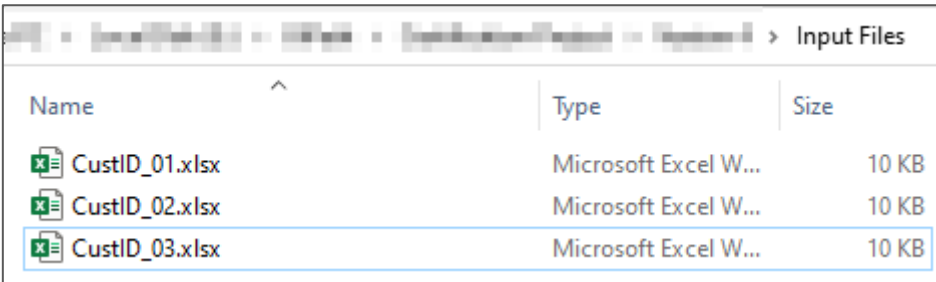
Solution Guidelines:




The solution would involve at-least following aspects:

Web Automation	Excel Automation	Email Automation
Credentials	Orchestrator	Queues
Data Manipulation	Logging	Exception Management
Modular Design (Multiple Workflows)	Template	Mail Configuration

Below are the major steps that the needs to be performed:

1. Create a Project in UiPath Studio and choose an appropriate template for the project. Also create folder structure to organize the project resources in a systematic manner.
2. Read each client's stock portfolio excel sheet located in the Input Files folder. You must fetch the data corresponding to each stock in each of these files. Implement necessary loop activities for the same.



Input Files		
Name	Type	Size
 CustID_01.xlsx	Microsoft Excel W...	10 KB
 CustID_02.xlsx	Microsoft Excel W...	10 KB
 CustID_03.xlsx	Microsoft Excel W...	10 KB

3. Open <https://www.nasdaq.com/market-activity/stocks> website to get the required details for a particular stock.
4. Implement a logic to enter details into the excel files one-by-one.
5. Once all the data have been read and excel sheet is filled, send the email to the customer with excel files as an attachment. Use necessary Email activities with the required settings.
6. Create and make use of Arguments, Variables, Try-Catch block, and Log Message activities wherever possible.
7. Use Log Message Activity to log your activities for fetching data, sending mail, etc.