**UIPath Donors and Alumni Paper Automation Tool**

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**Step 1:**

Use the “**PapersToAlumni**” Excel file to fill out the “**Abstracts and Papers**” sheet table.

1. Copy and paste the abstract of the first paper into the first row under the “**Abstracts**” header
2. Add the corresponding name (including their title [Dr., Professor, etc…]) into the same row under the “**Professor**” column.
3. Write the email for that same professor into the “**Professor Email**” column of that same row.
4. **Repeat** directions 1-3 for step 1 on a new row **for every paper** that’s intended to be sent out.

**Step 2:**

Run the UIPath Studio program called “**AlumniPapersAutomation**.”

1. Open **UIPath StudioX**
   1. If UIPath is not installed, see How to Install UIPath for instructions
2. Open the “**AlumniPapersAutomation**” program from C:\Users\cwp8267\Documents\UiPath\AlumniPapersAutomation

Or from the shared file (yet to be configured)

1. At the top of the application should be a **green triangle**, pressing this will initiate the bot. **Before pressing,** pleasure check the following:
   1. If “save to draft” is enabled under the process of “Send Email,” then all the created emails will go to the drafts folder of the email logged in to the UIPath program.
   2. Unchecking “save to draft” will allow the emails to be **sent** **automatically**. Just ensure that the email template is composed correctly, and the database is accurate **before sending**.
   3. Recommended that a test be run first that has “save to draft” enabled as to make sure there are no formatting errors and the application is connected correctly.

**Setup Activities**

**How to Install UIPath:**

Create a UIPath account (at [UiPath](https://cloud.uipath.com/portal_/register)) and download the UIPath StudioX application. After StudioX is installed, open up the AlumniPapersAutomation.json file to run the program.

**Connect the PapersToAlumni Excel Sheet:**

Find the PapersToAlumni sheet at C:\Users\cwp8267\Downloads\UIPath\PapersToAlumni Download this file and connect the AlumniPapersAutomation tool to it by navigating to the top of the program, clicking the file icon next to the plus sign, and using the file explorer to locate the Excel sheet locally.

**Login to Email on AlumniPapersAutomation:**

Navigate to the bottom of the workflow and select the drop-down underneath “Account” for the “Use Gmail” activity. Select “add new account” and authenticate in your web browser to use **your** email account or the desired sender for the emails. Do this only when logging into the program for the first time. If you have already logged in and authenticated, then select the appropriate user account in the drop-down menu of “Use Gmail” activity.

**How to Update the “Donors and Alumni” Sheet:**

When adding more rows to the “Donors and Alumni,” it is important to capture what information this respective donor would be interested in seeing. Based on a person’s given major or interests, select three topics from the dropdown list in columns “Interest1” “Interest2” or “Interest3” that correspond with the given person’s row. Be sure to copy the topics the way they are written in the Topics Options list since they are case and character sensitive and will produce an error if not input correctly. Be sure to also input their email and names in correctly, otherwise the email will not format well or they may not receive it.

**Change or Troubleshoot the Email Format:**

In order to change the way that the emails will be formatted when sent out, navigate to the bottom of the bot workflow and select “Open Editor” under the “Send Email” activity. Here, you can change how each email is formatted. If needed, the variables can be changed or added by selecting “Add data values” in the top right of the editor.