

Install instructions

(Currently still being revised, not all steps may be included)

The automated process sorts scanned documents, which lack explicit identification, into their appropriate folders. Once sorted, the process dynamically initiates a series of task-specific actions based on the document type. These actions range from dispatching emails to relevant stakeholders, to extracting and inputting data from the documents into Excel spreadsheets, among other operations.

Projects	SmartDocSorter, VirtualScanCreator, DocQueueBuilder
Author	Fynn Grabowski
UiPath Version	2023.10.0 (Community)
Orchestrator Version	2023.10

Contents

1	Installation Guide	3
---	--------------------------	---

1 Installation Guide

- Create the “Company Files” Folder
 - Choose a location for this folder. It can be on SharePoint or locally on your PC.
 - This folder will serve as a central point for storing the documents.
- Set Up Orchestrator Folder and Queues
 - Create an OrchestratorFolder in the UiPath Orchestrator.
 - Create two queues within this folder:
 - One queue for the documents to be created.
 - Another queue for the documents themselves.
- Configure Config.xlsxs
 - Adjust all file paths in the config.xlsxs settings of SmartDocSorter, VirtualScanCreator, and DocQueueBuilder.
 - If you haven't moved the Excel files, you can retain the existing file paths.
- SmartDocSorter Configuration
 - Modify the Outlook connection settings in the following workflows:
 - ReminderPaidSendMail
 - ReminderNotPaidSendMail
 - InvoiceSendMail
- Create Orchestrator Storage Bucket
 - In the UiPath Orchestrator, create a storage bucket named “Documents”.
 - This bucket will be used for managing and storing documents processed by the automation.
- Set Up Triggers for Automation Processes
 - Create a trigger for DocQueueBuilder to run every hour.
 - For SmartDocSorter, set up a trigger to activate when there are 5 elements in the queue.