

Robotic Process Automation using UiPath



Topic 5- File, Folder Automation in StudioX: Microsoft Excel Automation



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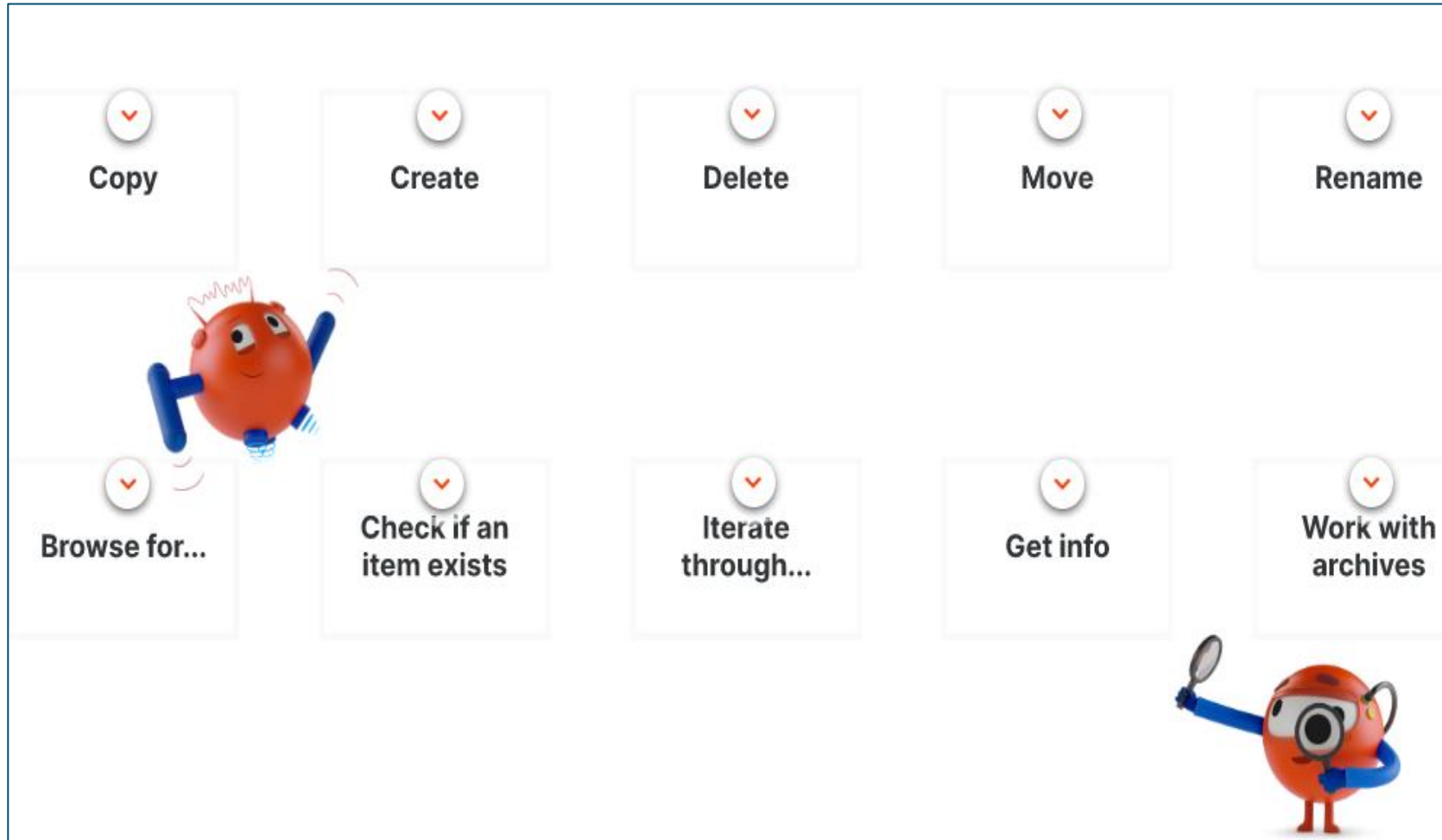
COURSE OBJECTIVES

- Introduction to RPA
- StudioX Citizen Developer Journey and Working with StudioX
- Activity Recording, UI Automation in StudioX
- Decisions, Iterations, and Scenarios in StudioX
- **File, Folder Automation in StudioX: Microsoft Excel Automation**
- Email & SAP Automation in StudioX
- Handle Errors in StudioX

5. File, Folder Automation in StudioX: Microsoft Excel Automation

- ❑ Introduction to file and folder automation
- ❑ Microsoft Excel automation
- ❑ Cell, Range, Pivot, Chart and Workbook Activities

INTRODUCTION TO **FILE AND FOLDER AUTOMATION**



INTRODUCTION TO FILE AND FOLDER AUTOMATION (Hands-on)

In this Demonstration we will be learning the following operations on files and folders using UiPath StudioX.

Create, Modify, Rename, Copy, Paste, Compress and Expand.

In this demo we are going to work on the following Zip File

- **MyInvoices**- You'll use this Zip file to automate the task described above.

INTRODUCTION TO FILE AND FOLDER AUTOMATION (Hands-on)

Main takeaways

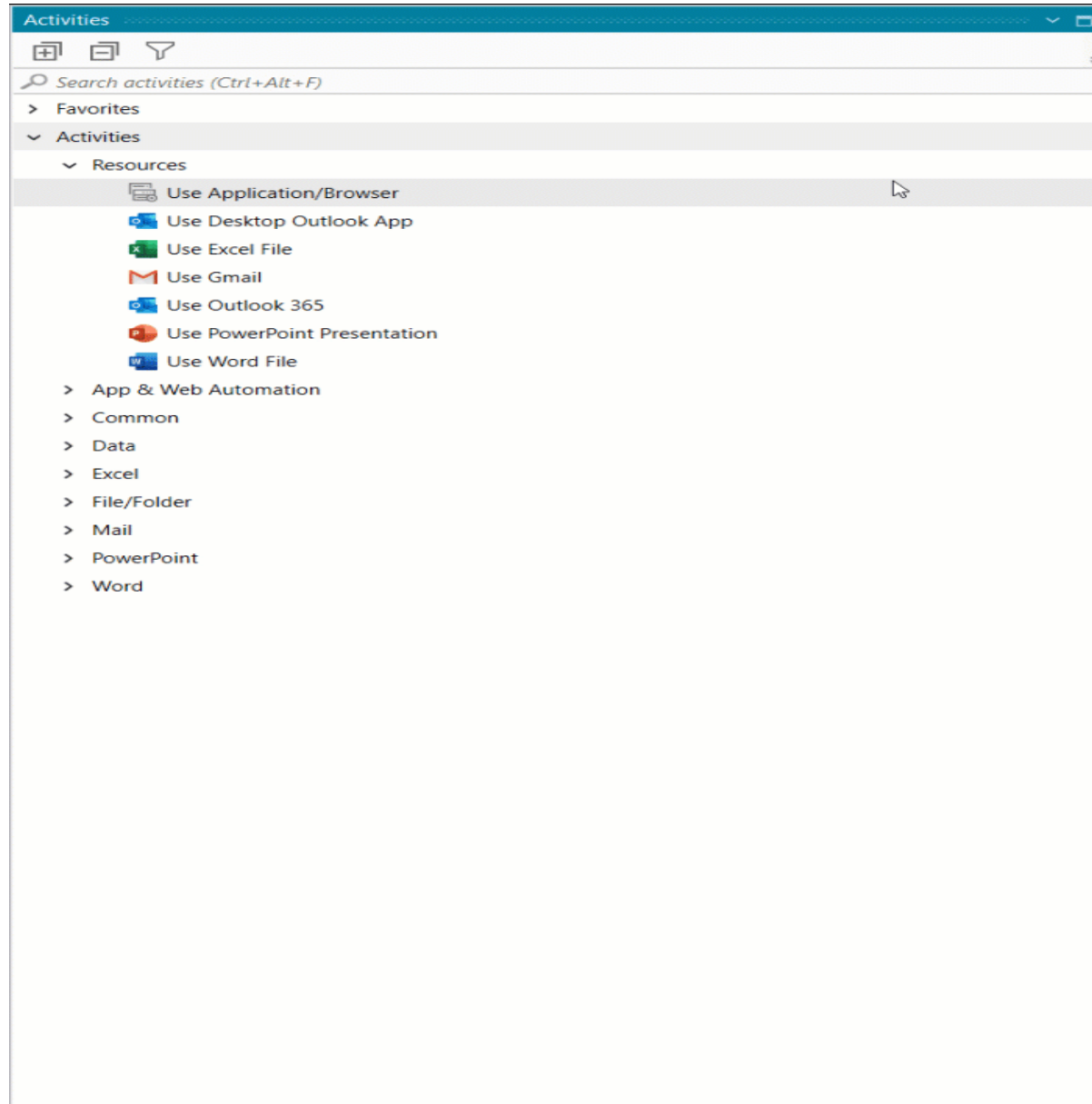
1. We first created a new folder for the renamed files with the **Create Folder** activity.
2. Then, we extracted the files with the **Extract/Unzip Files** activity.
3. With a **Write Line** activity, we could see in the Output panel which information was stored upon extracting the files.
4. For the automation to work on every extracted file, we used the **For Each File in Folder** activity. Inside it, we added:
 - a. a **Copy File** activity, to copy each extracted file to the newly created folder; to let the automation overwrite existing documents, we checked the Overwrite option.
 - b. a **Modify Text** activity, to separate the file's name from the extension.
 - c. and a **Rename File** activity, to rename the files in the destination folder as per company policy: FileName_SiriusCyberneticsCorp.extension.
5. In the end, we compressed the file containing the renamed invoices with a **Compress/Zip Files** activity.

MICROSOFT EXCEL AUTOMATION

Which of your Microsoft Excel operations should and should be automated, first and foremost? As a business user, Excel is probably something you use pretty frequently. Cleaning up data and creating pivot tables from downloaded csv reports may be a repetitive process you carry out. You might reconcile two reports per week at the end. These are tasks that StudioX makes it simple to automate.

- 1 Write values in a cell, read a cell's value and formula, and change its format.
- 2 Clean up a spreadsheet by inserting columns, auto-filling them, sorting data, and removing duplicates.
- 3 Copy ranges from one spreadsheet to another and perform a VLookup.
- 4 Create a pivot table and update its range and values.
- 5 Generate a chart, update its structure, and save it locally as an image.
- 6 Perform the same set of actions on multiple sheets.
- 7 Save and protect your workbook.

MICROSOFT EXCEL AUTOMATION



MICROSOFT EXCEL AUTOMATION- Cell Activities (Hands-on)

You will use the following input file while creating the automation:

1. **MyExcel-Cell.xlsx** - Using StudioX activities, you will combine the First Name and Last Name values to create the Whole Name value.

MICROSOFT EXCEL AUTOMATION- Range Activities (Hands-on)

In this Demo you will learn arranging the spreadsheets with the use of the Insert Column, Sort Range, and Remove Duplicates functions and setting up the VLOOKUP and Append Range operations to transfer data between files.

The following input files will be used in the automation development:

1. MyExcel-Range-Sheet1.xlsx
2. MyExcel-Range-Sheet2.xlsx
3. MyExcel-Range-Sheet3.xlsx

MICROSOFT EXCEL AUTOMATION- Pivot Activities (Hands-on)

In this Demo We will be learning about the Pivot Table activities.

The following input files will be used in the automation development:

1. **MyExcel-Pivot.xlsx**

MICROSOFT EXCEL AUTOMATION- Chart Activities (Hands-on)

You will discover how to aggregate the data using the Create Chart, Update Chart, Get Chart activity in the demonstration that follows and setting up the Prepare Data activity to draw attention to worker.

The following input files will be used in the automation development:

1. **MyExcel-Chart.xlsx**

MICROSOFT EXCEL AUTOMATION- Workbook Activities (Hands-on)

In this demo you will learn to automate a workbook with following activities.

Add Sheet, Protect Sheet, Delete Sheet etc.

The following input files will be used in the automation development:

1. **MyExcel-Workbook.xlsx**

TOPIC 5
END

THANK YOU