

Checklist REF without Queue Items

Prerequisites

Identify what type of data the automation needs to process for each transaction; decide the data type for the *TransactionItem* variable.

Configuration in UiPath Studio

Create **new project** using the **Robotic Enterprise Framework** template:

- Set a proper name for the project – based on the name of the automated process;
- Set a proper description for the project.

Edit the project's **configuration file**, found in the project folder, *Data/Config.xlsx*:

Settings sheet:

- Set a proper name for the *logF_BusinessProcessName* parameter; usually, this is the same as the name of the project; it is useful to link the process with log messages generated during execution;
- Define any additional values required for the process such as input file paths, application paths, parameters to control the automation flow, emails, etc.
- Credential assets should also be defined in this sheet, instead of the Assets sheet;
- The *OrchestratorQueueName* parameter can be deleted.

Constants sheet:

- Set the *MaxRetryNumber* value to a value greater than 0 if we want to use the retry mechanism built into the framework.
- Optionally, you can change the values of the other items defined in this sheet according to the process being automated.

Assets sheet:

- Add entries for all assets (except credential assets) defined in Orchestrator for this process.
- Optionally, you can add entries for rows in Settings sheet, with the same name, and later we can create those assets in Orchestrator, when we want to overwrite the value in *Settings* sheet without redeploying the process.

Save and close the *Config.xlsx*.


Change the TransactionItem data type

Edit the **Main.xaml** workflow to change the data type for the *TransactionItem* variable from the default *QueueItem* to the one required for the process under automation:

Locate the *TransactionItem* variable in the *Variables* panel; change the *Variable type* to the required type;

Locate the *TransactionData* variable in the *Variables* panel; change the *Variable type* to the required type, if necessary.

In the **Get Transaction Data state**:


Locate the *End Process (Stop process requested)* activity and set the value to the default value for the *TransactionItem*'s data type; 

Locate the *Invoke GetTransactionData* workflow activity and open the *Arguments* list; change the data type for the *out_TransactionItem* argument from *QueueItem* to the required type and the *io_TransactionData* from *DataTable* to the required type. Click OK to save the changes and close the dialog;


Expand the *Exception* section in the *Try GetTransactionData* section and locate the *End Process (Could not get new transaction)* activity; the change here is like the one performed at the beginning of this list.


In the **Process Transaction state**:


Locate the *Invoke Process workflow* activity and open the *Arguments* list; change the data type for the *in_TransactionItem* argument from *QueueItem* to the required type; click OK to save the changes and close the dialog;

Locate the *Invoke SetTransactionStatus workflow* activity and open the *Arguments* list; locate the entry for the *in_TransactionItem* argument and change the value (not the data type!) from *TransactionItem* to *Nothing*. 

Applications Used: open/close/kill

Edit the **Framework/InitAllApplications.xaml** workflow; it should contain the activities to start all the applications, perform the authentication and initial configuration required for all transactions in the process; 

Edit the **Framework/CloseAllApplication.xaml** workflow; invoke here the activities that should logout and close the applications opened in the *InitAllApplications.xaml* workflow; 

Edit the **Framework/KillAllProcesses.xaml** workflow; place here the activities to force close the applications used in the automaton. 

Business Process: Transaction Data and Process

Edit **Framework/GetTransactionData.xaml** workflow:

Change the data type for the *out_TransactionItem* argument from *QueueItem* to the required type;


Change the data type for the *io_TransactionData* argument from *DataTable* to the required type, if necessary;


Delete the *Get transaction item* activity (of type *UiPath.Core.Activities.GetQueueItem*);


Store transactions data into *io_TransactionData* argument, if necessary;

Add the activities to check if a new transaction is available;

On the transaction available branch, add the activities necessary to retrieve the information to be processed in one transaction;

On the no more transactions available branch, assign *out_TransactionItem* to stop value; 

Set a proper value for the *out_TransactionID* argument in the *Assign out_TransactionID* activity; 

Set proper values for *out_TransactionField1* and *out_TransactionField2* arguments in the next two assign activities. 

Edit **Process.xaml** workflow:

Change the data type for the *in_TransactionItem* argument from *QueueItem* to the required type;

Place all the activities and logic required to process one transaction. 