UIPATH TOOL – CUSTOM ACTIVITIES

Ultimate Suite for Filter Range & Pivot Table

Document Control Information

Document Information

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***[Accessing Functions : - Identifying where they are located in the user interface](#_Matching_Concept_:)***

***[All Functions are located under namespace of :](#_Matching_Concept_:)***

|  |
| --- |
| [1. Advanced.Excel.Extended](#_Matching_Concept_:) |

# Document purpose

## Objective

*This document should be useful to anyone who wishes to use UiPath’s’ Filter Range & Pivot Table – Datatable functions. This document provides step by step instructions on how to use this functions to perform various operations with Filter Range & Pivot Table – Datatable functions using UiPath Tool without requirement to code it from the scratch.*

*All of the functions explained in this document are UiPath activities which can be added in your projects to perform the specific operation on excel Applications. The details of the functions are explained in detail in this document.*

## Applications Involved

*The functions explained in this document involve the following applications:*

* *UiPath*
* *Microsoft Excel*
* **Note : -**
* *In most of the functions you will be able to see the watermark for each fields. By looking at that you will come to know that what exactly you have to mention in that field.*
* *In most of the functions you need not to add a activity to create a worksheet, functions itself checks the sheet, if the sheet is not exist then it creates an worksheet.*
* There are two different functions with similar look : -
* *1. Pivot Table which works with Excel Application scope – Input / Output can be Datatable & Sheet.*
* *2. Pivot Table which works without Excel Application scope – Input / Ouput is only Datatable.*
* *3. Filter Range Data which works with Excel Application scope – Input / Output can be Datatable & Sheet.*
* *4. Filter Range Data which works without Excel Application scope – Input / Ouput is only Datatable.*

# Prerequisites & Installation Steps

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| **Prerequisites** | | |
| Supported Excel versions | Supported Windows versions | Supported Uipath Excel Package |
| *Desktop Excel included in Office 365* | *Windows 10* | *Excel Package Version 2.3 and above* |
| *Excel 2016* | *Windows 8.1* |  |
| *Excel 2013* | *Windows 8* |  |
| *Excel 2010* | *Windows 7* |  |
| *Excel 2007* | *Windows Server 2008, 2012, 2016* |  |
| *32-bit and 64-bit* | *32-bit and 64-bit* |  |

***Package Installation Methods : - Method 2 - Steps : -***

1. *Place the .nupkg file in folder : Desktop or any desired folder*
2. *Go to* ***manage packages*** *option by clicking manage package in Activities Pane or simply press “****Ctrl + P****”*
3. *Right click on “****Available****” and click on “****Configure Sources****” and then in the Package source settings window, click the Add button (****+****) on right top.*
4. *Give any name in* ***“Name” field****. For Ex. “Custom\_Packages” and in* ***“Source” field***  *select or provide the folder where you have placed the .nupkg file.*
5. *Finally click on “Apply” and then click on “OK”. And then click the folder in left side and install / upgrade / downgrade the packages.*

*For more details : - Refer :* [***https://studio.uipath.com/docs/managing-activities-packages***](https://studio.uipath.com/docs/managing-activities-packages)

# Ultimate Suite Features

### Powerful Functions

* *Filter range of an excel worksheet or from a Datatable – With or without Excel Application Scope.*
* *Creation of Pivot Table of an excel worksheet or from a Datatable – With or without Excel Application Scope.*

# Release Notes

### Comprehensive set of time-saving/ease of coding tools

*With this collection of 60+ professional tools, you can accomplish any task impeccably without errors or delays. Highly experienced with Office development embodied in the perfect code of solutions that work flawlessly on all Excel versions, Datatables, etc.*

*The Ultimate Suite was designed to address the needs of all users that work with Excel, Datatables on a daily basis. So, why don't we add a few more tools to make your life a little easier and your work a bit more comfortable? Just think of them as a nice add on tools to help you manage your codings with accuracy and perfection.*

*The Excel activities package aids users to automate all aspects of Microsoft Excel, as we know it is an application intensely used by many in all types of businesses. It contains activities that enable you to Create a Pivot Table, Filter range data, Find & Replace, Text to columns and much more. You can also sort data, remove duplicates, copy paste the data, etc. All the activities in the latter category have to be included in Excel Application Scope to work.*

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| PIVOT TABLE GRID INTEGRATION – With or Without Excel Application Scope [**Go to Table of Contents Page**](#_Table_of_Contents_1) | | | |
| A PivotTable is an interactive way to quickly summarize large amounts of data.  You can use a PivotTable to analyze numerical data in detail, and answer unanticipated questions about your data. A PivotTable is especially designed for:   * Querying large amounts of data in many user-friendly ways. * Subtotaling and aggregating numeric data, summarizing data by categories and subcategories, and creating custom calculations and formulas. * Expanding and collapsing levels of data to focus your results, and drilling down to details from the summary data for areas of interest to you. | | * Moving rows to columns or columns to rows (or "pivoting") to see different summaries of the source data. * Filtering, sorting, grouping, and conditionally formatting the most useful and interesting subset of data enabling you to focus on just the information you want. * Presenting concise, attractive, and annotated online or printed reports. |
| The following diagram shows where each area of the pivot table is located on the report.  This can be used as a guide to familiarize yourself with the different areas. | |  |
| The Pivot Table Areas The pivot table contains four areas that you can drag the fields into to create a report.   1. Filters area, Columns area, Rows area, Values area | |  |
| **Note : - (Input can be either Datatable / Existing Sheet)**  Sheet : - Provide the Sheet name  Datatable : - Provide the Datatable name  Output Datatable : - Output as Datatable  Output Sheet : - Output as Sheet  Additional Features : - Checkbox: If you want the pivot data needs to be pasted as Values  Checkbox: Repeat Labels  Checkbox: Show Subtotals  Note : By default pivot table will get generated in Tabular layout. In case if you want to change the layout to  compact or any then use the Pivot Table Layout changer function.  **-------------------------------TO DO IN PIVOT TABLE GRID---------------------------**  Header Name : - Provide the Header Name (Ex. “US Employees”) and you can pass ‘ the header name also as Variable. Ex. Row(2).ToString  Header Areas : Dropdown list (As rows, columns, filters, values)  Function : Dropdown list (Sum, Count, Minimum, Maximum, Average)  Note : - For Header Areas apart from “Values” - Please select “None” in Function Column. | |  |
| FILTER RANGE DATA GRID INTEGRATION – With or Without Excel Application Scope [**Go to Table of Contents Page**](#_Table_of_Contents_1) | | | | |
| AutoFilter is an easy way to turn the values in Excel column into specific filters based on the cell contents.  You can filter based on choices you make from a list, or you can create specific filters to focus on exactly the data that you want to see. | By filtering information in a worksheet, you can find values quickly.  You can filter on one or more columns of data. With filtering,  you can control not only what you want to see, but what you want to exclude. | | | |
| Excel is versatile in the filter settings. You’re not limited to just items containing a specific value.   * Equals * Does not equal * Is greater than * Is greater than or equal to * Is less than * Is less than or equal to * Begins with * Does not begins with * Ends with * Does not ends with * Contains * Does not contains |  | | | |
| **----------------------------------------TO DO IN FILTER GRID-----------------------------------------------------**  Header Name : - Provide the Header Name (Ex. “US Employees”) and you can pass the header name also as Variable.  Operators : - Dropdown list (Equal, contains, begins with, etc.)  Values to filter : - Pass the values / variables which you want to be filtered (Array) | **Note : - (Input can be either Datatable / Existing Sheet)** Sheet Name : - Sheet name Sheet Name Datatable name Datatable Name Output Datatable : - Output Datatable name Datatable Name Output Sheet : - Sheet Name \*\*Paste Range : - Range as (“A1”) \*Paste Type Formats : - \*\*Paste Type : - Dropdown (xlPasteAll, xlPasteValues, etc.)  Note : Highlighted with \*\*symbol is valid only if you want the ouput in sheet. | | | |