Robotic Process Automation Training using UiPath

Certification Project

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Certification Project

Investment Report

StockExchange house is a mid-sized company that manages the investment of its clients. Its clients have exposure into various types of instruments such as Mutual funds, stocks, bonds etc.

The company is seeing a great deal of appreciation in its customer base; however, because of increasing customer base, it is no longer able to cater to the specific demands of its customers.

The nature of stock business is highly volatile; hence the company needs to send report of the stock prices to its customers many times in a day. The company is planning to create a robot that will fetch the prices from www.moneycontrol.com website and send the report to its customers.

Using the following inputs, you are required to build this automation using UiPath software product and deploy the solution on Orchestrator so that the Robot(s) can be tasked and monitored from agency's HQ.
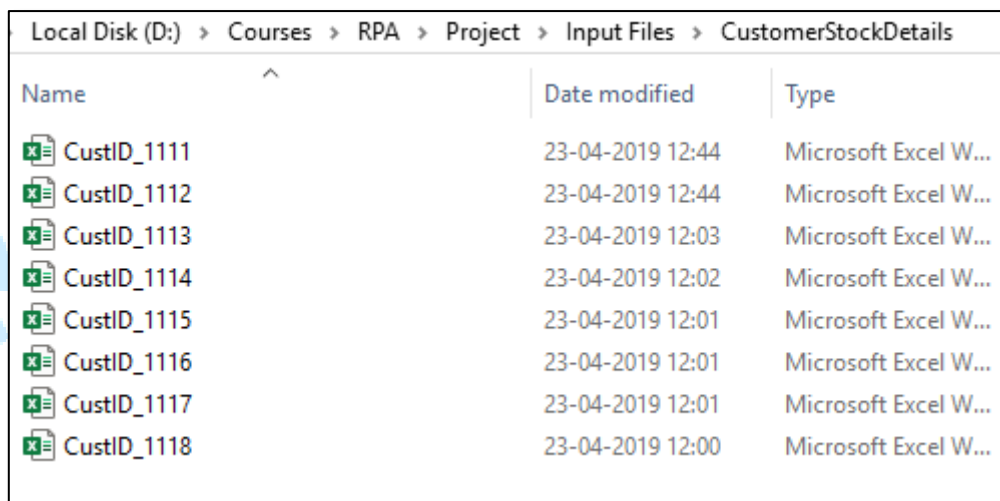
Solution Guidelines:

This solution would involve at-least following aspects:

Web Automation	Excel Automation	Email Automation
Credentials	Orchestrator	Queues
Data Manipulation	Logging	Exception Management
Modular Design (Multiple Workflows)	Template	Configurable Etc…

Below are the major steps that the robot should perform:

1. Login to Orchestrator CE. Create a queue on Orchestrator which will be used to push the Stock Report data.

2. Create a Project in UiPath Studio as follows:

3. Choose an appropriate template for the project. Also create folder structure to organize the project resources in a systematic manner.

4. Read each client's stock portfolio excel sheet located in the Input Files > **CustomerStockDetails** folder. You have to fetch the stock prices corresponding to each stock in each of these files. Implement appropriate loop function for the same.

Local Disk (D:) > Courses > RPA > Project > Input Files > CustomerStockDetails

Name	Date modified	Type
CustID_1111	23-04-2019 12:44	Microsoft Excel W...
CustID_1112	23-04-2019 12:44	Microsoft Excel W...
CustID_1113	23-04-2019 12:03	Microsoft Excel W...
CustID_1114	23-04-2019 12:02	Microsoft Excel W...
CustID_1115	23-04-2019 12:01	Microsoft Excel W...
CustID_1116	23-04-2019 12:01	Microsoft Excel W...
CustID_1117	23-04-2019 12:01	Microsoft Excel W...
CustID_1118	23-04-2019 12:00	Microsoft Excel W...

5. Open Moneyconrol.com website to look for stock prices. For each stock mentioned in the excel sheet, fetch the stock price from the Moneycontrol.com website.

6. Implement a logic to enter details into the excel files. Enter the price read from the website into the customer stock details excel sheet one-by-one.

7. Once all the stock prices have been read and excel sheet filled, send the email to the customer with excel file as an attachment. Use appropriate Email activities with required settings.

8. Create and make use of Arguments, Variables, Try-Catch block and Log Message activities wherever possible.

9. Log the activities in orchestrator. Create Alerts if applicable.

10. Log send mail as transaction in orchestrator queue.