





**PDF & Email Automation**

# Mail & PDF- Agenda

- Ui PDF types**
- Ui Reading using PDF activities**
  - Ui Read PDF Text**
  - Ui Read PDF with OCR**
- Ui Read PDF using Acrobat**
- Ui Email protocols, server, client**
- Ui UiPath activities**
  - Ui By protocol**
  - Ui By server / client**
- Ui Send attachments**
- Ui Save email & attachments**

***Best Practices***  
***Q&A***  
***Test***  
***Online Resources***

# Reading PDF Overview

- **PDF Types**
- **Reading using PDF activities:**
  -  *Read PDF Text*
  -  *Read PDF with OCR*
- **Reading using Acrobat Reader**

## NATIVE

*text can be selected*

<b>Pay This Amount</b>		SERVICE ADDRESS 1 MAIN ST ANYTOWN MA		LOAD ZONE SEWASS		7059999999999	
\$74.08		SERVICE PERIOD NOV 03 TO DEC 07 2005		34 DAYS		TYPE OF METER READING ACTUAL	
<b>Account Number</b>		<u>METER NUMBER</u> 012345678		<u>RATE</u> R-1		<u>METER PRESENT</u> 557	
99999 99999 99						<u>READING PREVIOUS</u> 0	
<b>Bill Date</b>						<u>KWH USAGE</u> 557	
DEC 08 2005		NATIONAL GRID					
		RATE: RESIDENTIAL REGULAR R-1					
<b>NEXT METER READING DATE</b>				<b>PREVIOUS BALANCE</b>		\$ 33.05	
JANUARY 09				<b>PAYMENT-THANK YOU</b>		12/07/05	
				<b>BALANCE FORWARD</b>		-33.05	
						.00	
		<b>DELIVERY SERVICES:</b>					
		CUSTOMER CHG				5.81	
		DISTRIBUTION CHG		.02377 X		13.24	
		TRANSITION CHG		.00862 X		557 KWH= 4.80	
		TRANSMISSION CHG		.00819 X		557 KWH= 4.56	
		ENERGY CONSERVATION		.00250 X		557 KWH= 1.39	
		RENEWABLE ENERGY CHG		.00050 X		557 KWH= .28	
<b>MONTH</b>		<b>TOTAL KWH</b>					
D 05		557					
N 0		659					
O		590					
		<b>TOTAL CURRENT DELIVERY SERVICES</b>				\$ 30.08	
		<b>TOTAL DELIVERY SERVICES</b>				\$ 30.08	

**SCANNED**

***text is an image***

Item	Description	Part Number	Unit	Qty	Need By	Unit Price	Extended Amount
1	<p>The consultant will implement the required ...</p> <p>The consultant will implement the required enhancements to TAC's Service Locator view to add the following additional functionality (also described in support ticket #2012031510000096 and #2012031910000132):</p> <ul style="list-style-type: none"> <li>- Filters should support AND and OR operators and wildcard patterns for service names, namespaces and metadata fields</li> <li>- Filters need to be persistent</li> <li>- Users should be able to view predefined subsets of the service endpoints</li> <li>- Auto-refresh of the Service Locator view</li> </ul>		hour	170	None	187.00CHF	31,790.00CHF

Order No.: 4500221240

Form:

Contract: CC5660

Supplier Contract Ref:

Location: 3rd floor

Phone Number: +41786329448

Tax Code: B1

Tax Rate: 8%

Gross Cost: 34,333.20CHF

# Read using PDF activities

## ***Read PDF Text:***

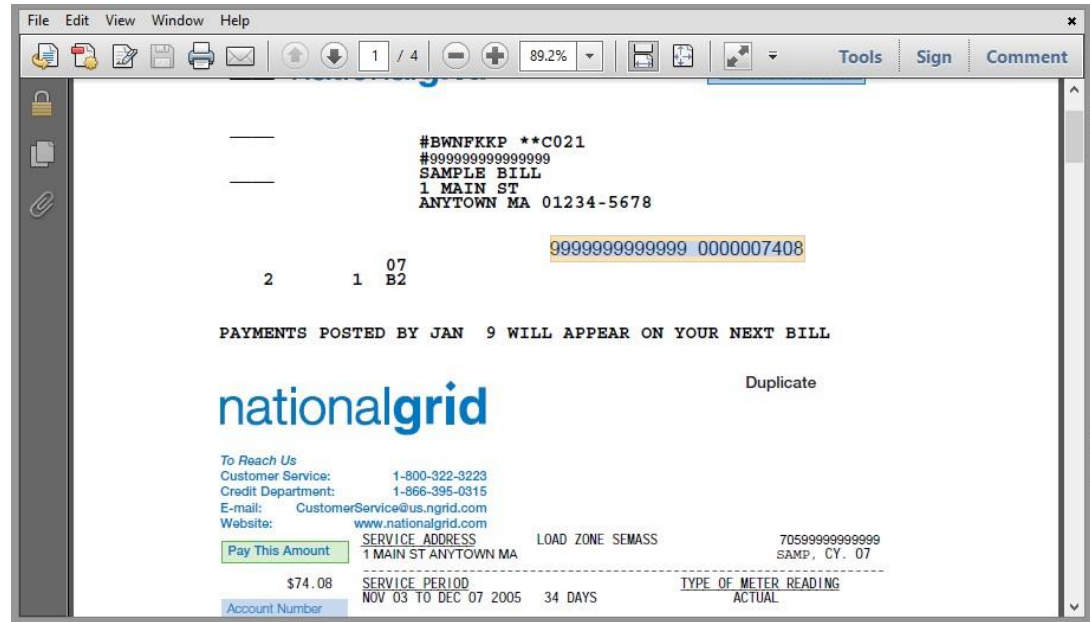
- works for NATIVE .pdf docs
- doesn't preserve formatting
- can read the whole document or certain pages (use Range property)
- runs in background

## ***Read PDF with OCR:***

- works for SCANNED .pdf docs
- uses OCR engines (MODI, Google, Abbyy)
- can read the whole document or certain pages (use Range property)
- runs in background

# Reading PDF using UI Automation

- Open Adobe Acrobat
- Use Screen scraping / Get Text
  - ★ keeps formatting
  - ★ needs Adobe Acrobat Reader or a compatible pdf reader
  - ★ can select certain fields



# Email Automation Overview

- **Email protocols, server, client**
- **Activities for**
  - Email Protocols (**SMTP, POP3, IMAP**)
  - Email Server (**Exchange**)
  - Email Client (**Outlook**)
- **Send email with attachments**
- **Save email & attachments**

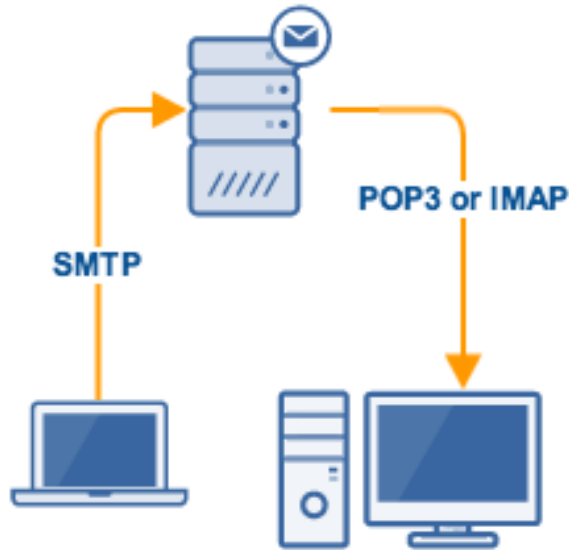
# Email Protocols (SMTP, POP3, IMAP)

## SMTP

used for sending out emails

▲ SMTP

✉ Send SMTP Mail Message



## POP3 & IMAP

used for retrieving emails

▲ POP3

✉ Get POP3 Mail Messages

▲ IMAP

📁 Move IMAP Mail Message

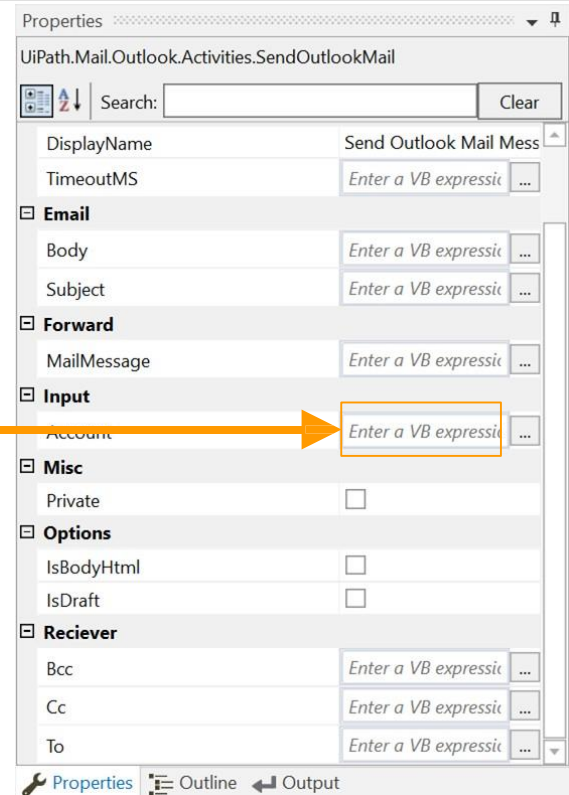
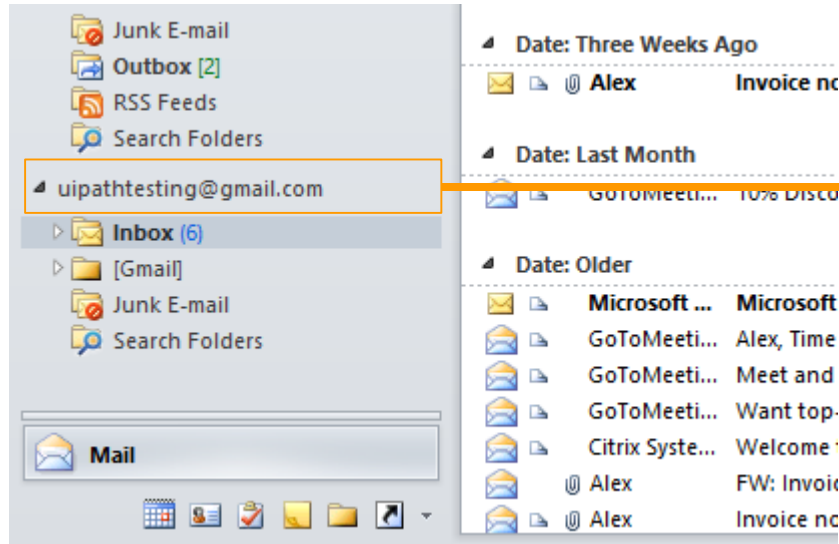
✉ Get IMAP Mail Messages

**IMAP** is more customizable (can get only unread emails, mark emails as read or not)

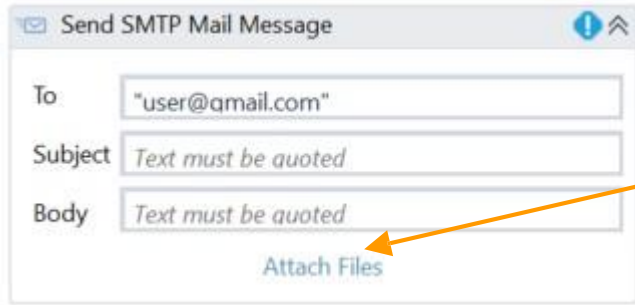


# Email Outlook activities

No need for credentials, server, port - only your **Outlook account**



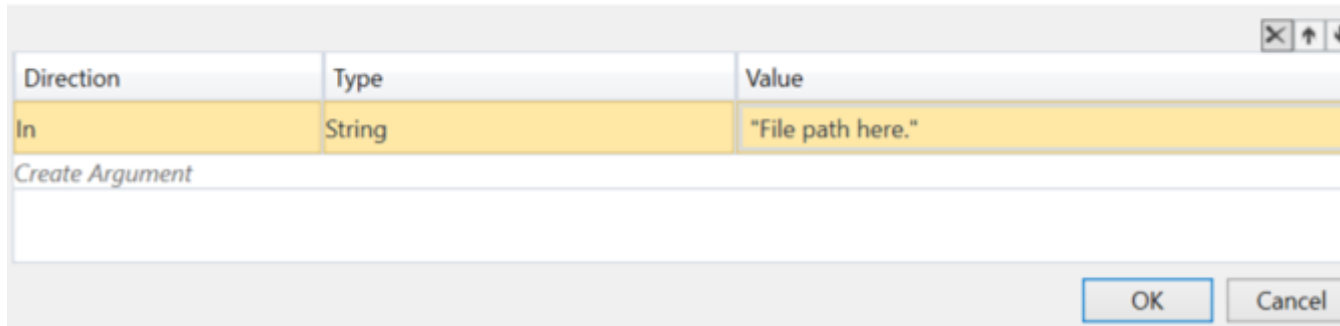
# Send Emails with Attachments



The dialog box titled "Send SMTP Mail Message" contains three input fields: "To" with the value "user@gmail.com", "Subject" with the placeholder "Text must be quoted", and "Body" with the placeholder "Text must be quoted". Below these fields is a button labeled "Attach Files". An orange arrow points from the text "Use Attach Files button" to this button.

Use **Attach Files** button in Send activities to add attachments (through arguments).

Files



The "Files" dialog box features a table with three columns: "Direction", "Type", and "Value". It includes a "Create Argument" section at the bottom and "OK" and "Cancel" buttons.

Direction	Type	Value
In	String	"File path here."

Create Argument

OK Cancel

# Save Mail Message/Attachments

## Save Mail Message

saves the email (*MailMessage*)

 Save Mail Message



 SaveMail 

...

## Save Attachments

downloads the attachments.

 Save Attachments



 SaveMailAttachments 

...



Q&A



Test

# Online resources

PDF:

 <http://www.uipath.com/kb-articles/scraping-pdf-files-using-read-pdf-activity>

 <http://www.uipath.com/kb-articles/extract-text-with-ocr>

Email:

 <http://www.uipath.com/kb-articles/email-automation-mail-trigger-sample>

# Annex - helper

**Mail message properties:** [https://msdn.microsoft.com/en-us/library/system.net.mail.mailmessage\\_properties\(v=vs.110\).aspx](https://msdn.microsoft.com/en-us/library/system.net.mail.mailmessage_properties(v=vs.110).aspx)

## **Mail headers**

[https://msdn.microsoft.com/en-us/library/system.net.mail.mailmessage\\_headers\(v=vs.110\).aspx](https://msdn.microsoft.com/en-us/library/system.net.mail.mailmessage_headers(v=vs.110).aspx)

## ***Protocol settings for Gmail:***

### **SMTP**

Port : 587

Server : smtp.gmail.com

### **POP3**

Port : 995

Server : pop.gmail.com

### **IMAP**

Port : 993

Server : imap.gmail.com

## **Install Microsoft OCR engine (MODI):**

<https://www.microsoft.com/en-us/download/details.aspx?id=21581>