Recording

Recording - Agenda

- **Recording overview**
- **Using the recorder**
  - Automatic Recorder
  - Step by Step
- **Recording profiles**
  - Basic recording
  - Desktop recording
  - Web recording
  - Citrix Recording

Best Practices
Q&A
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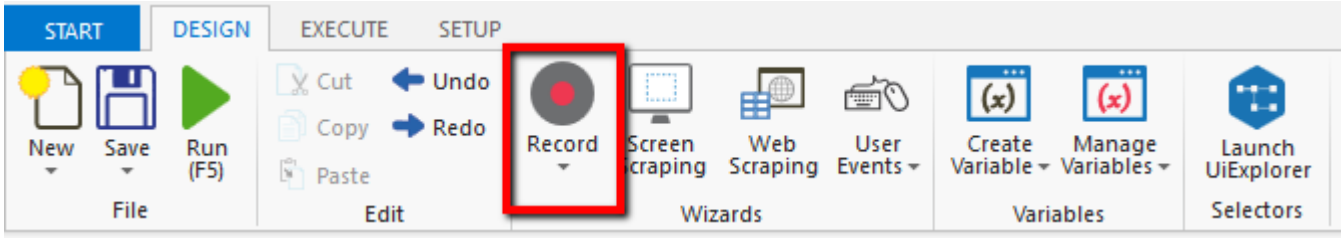
Using the Recorder

How does it work?

- Recording mouse clicks and keyboard types and generating automated workflows scripts.



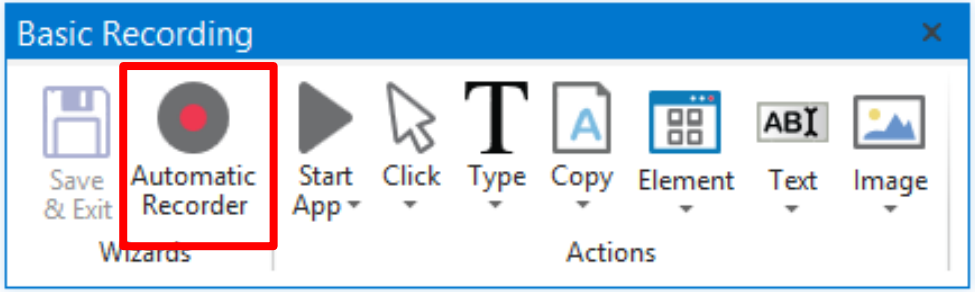
Why using Recording ?

- Helps you **get started** (don't need to know anything about UiPath activities)
- **Learn about basic UI activities** and how to use them
- Creates **quick visual representations** of your business process
- The output comes with many **already set up** properties (eg creating variables)
- Creates a **skeleton of the UI automation** that you can tweak & parametrize later

Recorder : How to use it?

- Choose **Automatic Recorder** or **Step by Step** automation actions
- **Select elements,** from the screen, **type**, **click**
- Delay Selection **F2** (3 sec) for Volatile UI (Menu, Scroll)
- Stop recording with **ESC** or **RIGHT Click**
- **Save** & **Exit**

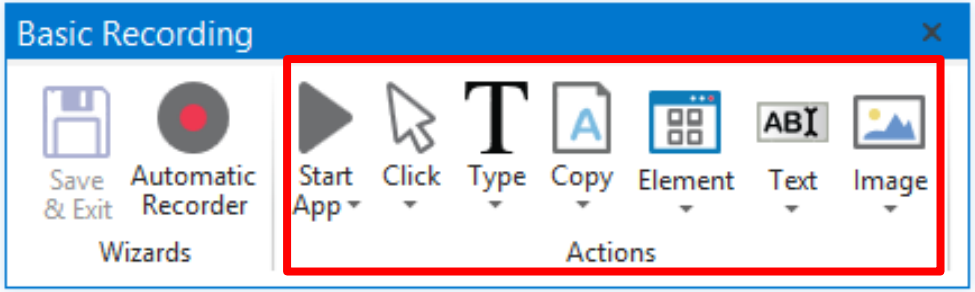
Automatic Recording



Actions that can be recorded:

- **Click**
  - buttons (generates *Click* activity)
  - checkboxes, radio buttons (generates *Check* activity)
  - dropdown (generates *Select Item* activity)
- **Type** (generates *Type Into*)

Step by Step (Manual) Recording



Step by Step Recording - adding activities individually

Can recreate all Automatic Recording actions, plus:

- Open & Close apps
- Get text, Scrape screen
- Image or text based UI Actions

Basic vs Desktop recording

BASIC

- Generates a **full selector** for each activity
- **Slower** than the workflow that uses attach containers
- Use it when you have to do one **one activity per window**

DESKTOP

- Recorder generates an **Attach Window** container with the window selector
- Generates a **partial selector for the activities inside** attach
- Runs **faster** than the Basic recording
- Optimal for doing **more than one action/ container**

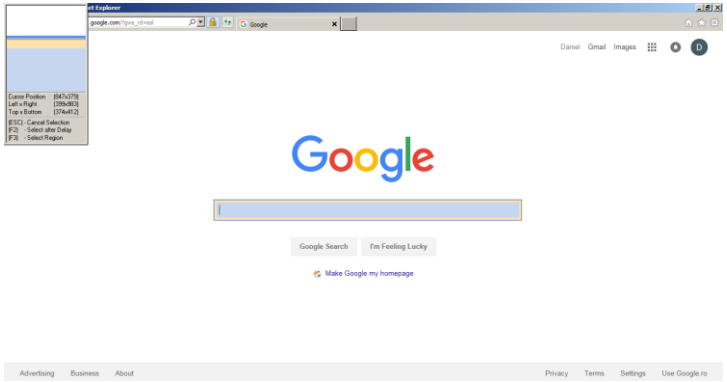
Exercise 1: two instances

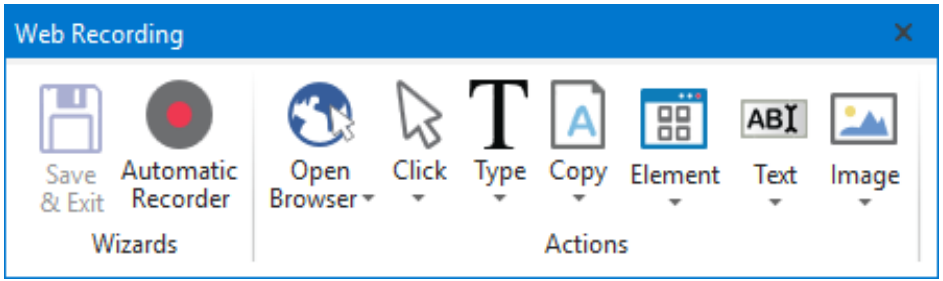
Open two instances of the same app and see which gets automated

1. try it with two untitled notepads
2. try the same with two Internet Explorer pages loaded with the same page
3. use basic recorder and desktop recorder and see the difference

Web Recording

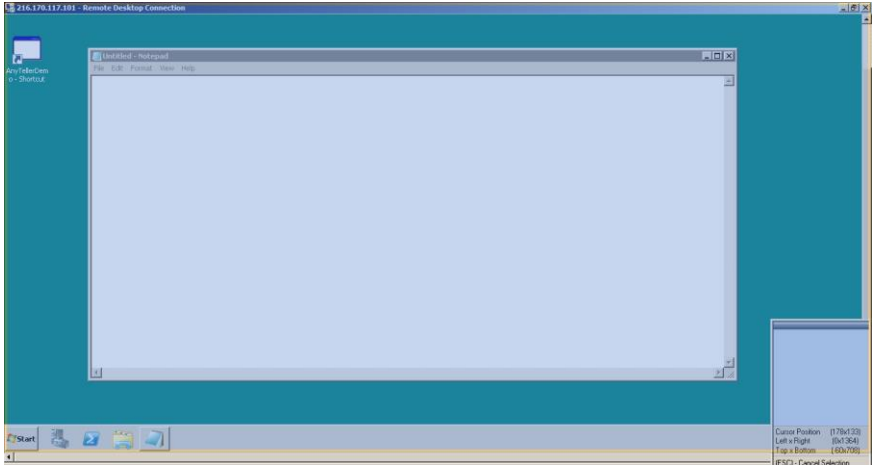
- native support for **Internet Explorer**, need to install extension for Chrome and Firefox
- the output - similar to **Desktop Recorder**
- actions taking place within a webpage are grouped under an **Attach Browser** container
- browser opened with **Open Browser** activity
- default typing & clicking method **Simulate Click**

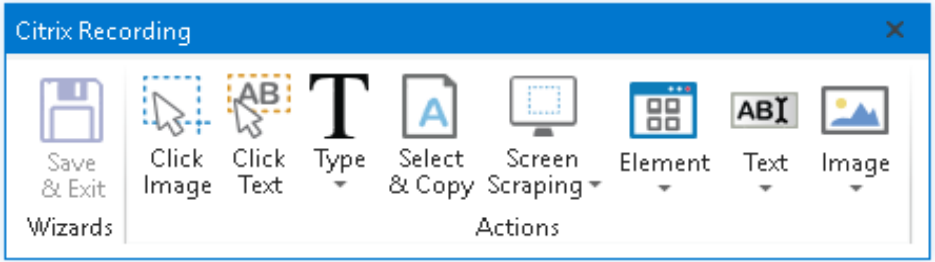




Citrix Recording

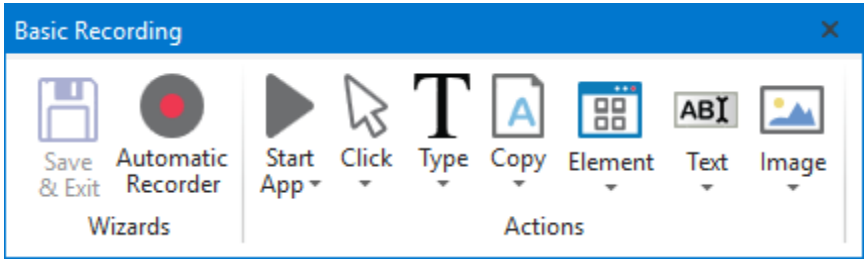
- individual **UI elements cannot be selected**
- explicit focus/positioning required
- no UI automation possible, but
  - **image** automation
  - **text** automation
  - **keyboard** automation



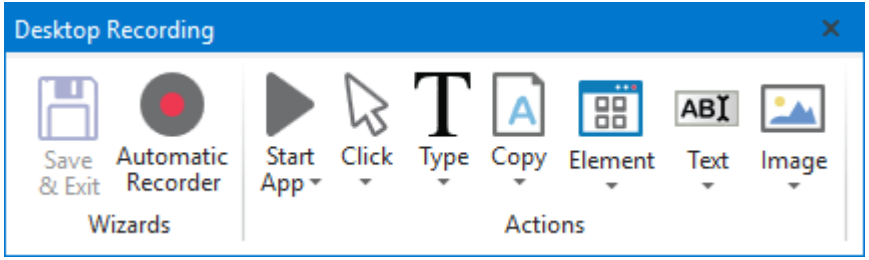


Recording Profiles

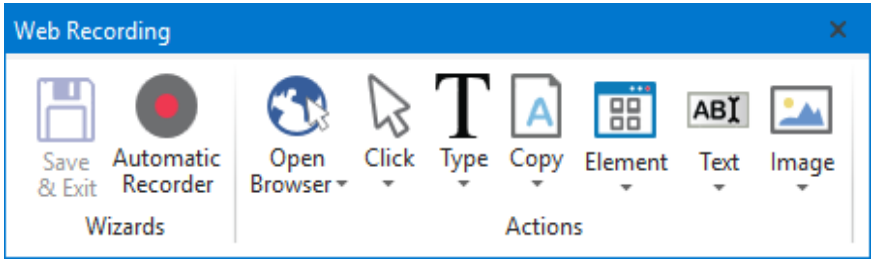
Basic Recording



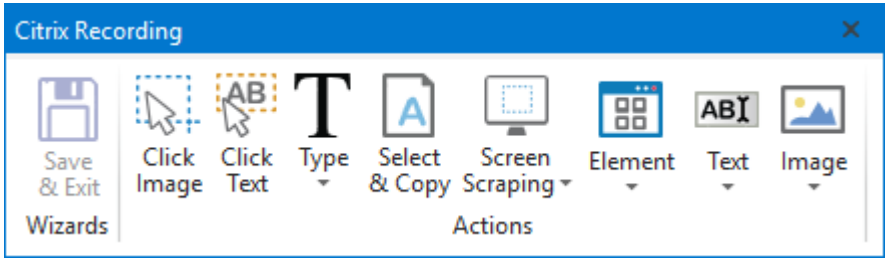
Desktop Recording



Web Recording



Citrix Recording



Exercise 2: use recorder

Get the quotation from a custom stock exchange company

1. navigate to Yahoo finance and search for what the user writes in the Input Dialog

2. get the quotation value and display it in a Message Box

Best practices

- For **one action per container use Basic recording** profile. **For the rest, use Desktop recording**.

- Only make variables global (at top level scope) if they need to be used throughout the process. Otherwise **put the variables in scope of where they are needed**.

- Use **meaningful Display Names** to make your workflows easier to read

- Use **comments / annotations** to describe a complicated piece of logic or expression

- Create **new variables** with **Right Click** > Create variable or (**Ctrl + K**)

Q&A

Test

Online Resources

- Difference between basic and desktop recorder
- Basics of Desktop Automation
- Recording in UiPath 7.5 - video
- Recoding with UiPath 7.5 - article