

Generate Yearly Report Workflow

1. Initialize

- Open UiPath Studio.
- Create a new Blank Process.
- Name the process "Generate Yearly Report".
- Save the project in an appropriate directory.

2. Input Data

- Define variables:
 - Year: Integer variable to store the year for which the report needs to be generated.
 - TaxID: String variable to store the Tax ID for the report.
- Use Input Dialog activities to prompt the user to input the Year and Tax ID.

3. Download Monthly Reports

- Use a For Each loop to iterate through each month of the year.
- Inside the loop, use a Sequence activity.
- Within the Sequence:
 - Use a Navigate To activity to open the ACME System website.
 - Use activities to log in to the ACME System.
 - Use a Click activity to navigate to the "Monthly Report" section.
 - Use a Type Into activity to input the month and year.
 - Use a Click activity to download the monthly report.
 - Use a Delay activity to ensure the download completes.
 - Use a Check File activity to verify the download.
 - Use an If activity to handle cases where the download fails.

4. Merge Monthly Reports

- Use a Sequence activity.
- Inside the Sequence:
 - Use a Read Range activity to read each monthly report.
 - Use a Merge DataTable activity to merge the monthly reports into a single DataTable.
 - Use a Write Range activity to write the merged DataTable to an Excel file.

5. Upload Yearly Report

- Use a Sequence activity.
- Inside the Sequence:
 - Use activities to navigate to the "Yearly Report" section.
 - Use a Click activity to initiate the upload process.

- Use a Type Into activity to input the filename in the upload dialog.
- Use a Click activity to confirm the upload.
- Use a Get Text activity to retrieve the Upload ID from the confirmation message.
- Store the Upload ID in a variable.
- Use a Log Message activity to display the Upload ID.

6. Finalize

- Use a Message Box activity to inform the user that the process is complete.
- Save the workflow.
- Test the workflow with different inputs to ensure it works correctly.

This compressed workflow summarizes the key steps required to generate the yearly report efficiently and accurately. By following this workflow, the robot can automate the process effectively, ensuring all criteria for a correct processed item are met.