UiPath Automation Hub Overview

Why Automation Hub?

* What it is
  + Collaborative tool for automation opportunity identification, pipeline management, and process repository
  + Meant to accelerate adoption of RPA across organization by creating a Community of Interest for RPA (puts employees in drivers’ seat of automation initiatives)
* Why you need it
  + Need 3 things to truly scale automation:
    - Right people contributing to program (Center of Excellence team, IT, and business users)
    - Common framework and language around RPA (from workflows to best practices and governance)
    - Coverage of entire automation lifecycle in 1 place (opportunity identification phase to implementation, supplemented by storage of related documentation and way to leverage reusable code)
* What challenges does it solve?
  + Challenges: features
    - RPA adoption across entire organization: automation opportunity identifier
      * Important to involve employees because:
        + They are the ones using the automations
        + Best ideas about what to automate next come from employees
      * Enables organization to source ideas from employees and involve them in providing documentation
      * Enables specialized opportunity identification done by employees and consultants with RPA expertise
      * Algorithm assesses opportunities and they go to centralized pipeline where they can be viewed and managed
    - Active participation in automation program: enterprise community
      * All employees should have access to automation ideas and should be able to express their interest and support in program
      * Helps build community of people interested in automation
        + Allows all interested users to connect and drive automation program; users get recognized and rewarded for participation
    - Transparency over automation program: pipeline manager
      * Hard to identify who owns RPA initiative or understand key challenges or opportunities for potential automation
        + This can erode trust in RPA program and make collaboration difficult
      * All users able to view pipeline of automation ideas and explore content and progress
        + Program managers (and system admins) have access to additional info and permissions enabling management
    - Consistent controlled and data-driven selection process for candidates: ROI calculator
      * Often automated opportunities aren’t the best ones (too difficult to implement, don’t yield benefits)
      * Can refine benefit and cost estimations
        + Ability to estimate profitability allows better automation decisions
    - Measure and track performance of automation program: performance dashboards
      * Ideas managed with different tools makes keeping accurate up to date view on performance of automation program
        + Reports require time and collaboration from so many people whose time is better spent elsewhere
      * Out of the box dashboards and reports available that help you understand and share program’s progress
    - Centralized repo of all automation-related documentation: documentation repo
      * Probably struggling to track down info support teams need or troubleshoot issues for processes launched in production when implementation teams have moved on
      * Enables collection, storage, and consumption of all documentation in a single place
    - Consistent quality of code delivered in production: reusable components repo
      * Development is software development
        + Needs speed, code quality standards, and avoiding double work
      * UiPath public marketplace of reusable components
      * Automation hub gives your own private internal marketplace allowing creation, curating, and usage of components people in organization have made across automations
        + As gallery of reusable components grows it enables you to speed up development and ensure consistent quality for code delivered

Getting Started with UiPath Automation Hub

* What you will find
  + All features and capabilities revolve around 4 elements
    - Automation ideas
      * Initiatives are core of any RPA program
    - Reusable components
      * Reusable parts of automations developed
      * Include custom activities, templates, or connectors
      * Having them in a single place helps effectiveness by avoiding double work and increasing code quality
    - People
      * Place for all employees who want to contribute and benefit from automation
      * Can submit ideas and components, collaborate in lifecycle of automation, or engage with other people or ideas interested in
    - Automations
      * Attended projects developed by citizen developers, shared for consumption
      * People can explore and request automations that can be used when provided

Personas and User Roles in automation hub

* Who uses automation hub?
  + Employees with automation ideas
    - Users need transparency on program and easy way to contribute with ideas and expertise
  + C-suite
    - Needs single source of truth on performance of program and reliable and easy way to read info for decision-making process
  + Center of excellence leaders and teams
    - Members need 1 place to store info, documentation, and contribute to automation ideas turning them into reality
* From people to user toles
  + Standard user
    - All employees
    - Have access to explore existing automations, submit new ideas, manage components, or download available components
    - This permission assigned by default all other permissions come on top of it
  + Idea approver
    - First gate approvers of automation ideas
    - Responsible for pushing forward ideas by identifying duplicates, approving and rejecting ideas submitted
  + Authorized user
    - Business analysts, process consultants, subject matter experts, process owners
    - Offers access to submit idea
    - CoE driven functionality allows for idea to be submitted when assessment filled in
  + Program manager
    - Center of Excellence Leader
    - Role assigned to leader allowing them to manage pipeline and access dashboards and reports to make decisions on automation program
  + Component curator
    - Solution architects and RPA developers
    - Role has limited access to admin console to manage reusable components queued for curation
  + System admin
    - IT administrator, CoE leader
    - Has access to manage tenant users and customize platform
    - Use admin console to set up platform tenant according to organization’s needs
  + Account owner
    - First user of tenant
    - Allows additional configuration options on top of system admins
    - Includes enabling features including file upload, date formatting, and changing logo
  + RPA sponsor
    - Executives
    - Have read-only rights for viewing all info around automation ideas and reusable components and access to built in dashboards and reports

Automation Ideas in Automation Hub

* Automation profile in automation hub
  + About
    - Offers overview of idea and automation score
    - Displays media files, similar automations, benefits, challenges, and lessons learned
    - May contain detailed assessment depending on submission path and phase and status
  + Cost benefit analysis
    - Shows estimated benefits and costs with implementing and running automation projected 2 year period
    - Performed in later phases of idea lifecycle
  + Documentation
    - Contains document templates, documents related to process “as is” and documents filled in throughout lifecycle
      * Include PDD, solution design document, and development specification document
      * Also has task capture output files
  + Components
    - Contains all reusable components used in implementation
  + Collaborators
    - Contains all users added on idea with different roles with submitter
    - When new collaborators added, user roles assigned, and tasks automatically created
* Where do automation ideas come from?
  + Employee-driven ideas: meant for business users
    - Centered around simplicity
  + Center of excellence-driven ideas: reserved for authorized users
    - Meant to make full use of in-depth knowledge users have about proposed processes

Submitting an Employee-driven Automation Idea

* What you need before submission
  + Description and Name
  + Categories
  + How rule-based is process
  + Type of input: how digital input is
  + How structured input is
  + Are there expected changes: 6 month term; may be insufficient information
  + Documentation: not necessary but is included in idea score if available
  + Name of process owner: not necessary; can pick from list or IDK

Preview of the Automation Idea Lifecycle

* How ideas become automations
  + Idea
  + Assessment
  + Qualification
  + Analysis
  + Solution design
  + Development
  + Testing
  + Live
* Roles at the automation idea level
  + Submitter
  + Process owner
  + Project manager: assigned by program manager; can assign other roles
  + Business analyst: fill in PDD
  + Solution architect
  + RPA developer
  + Each role comes with predefined permissions which can be added to by system admins
* Recap roles and collaborator roles
  + Roles: platform level to allow distribution of responsibilities in CoE and organization
  + Collaborator roles and editing rights: granted at individual idea level
  + Users may have different collaborator roles and editing rights for different ideas
  + Collaborator roles come with predefined permissions, some roles and permissions can be edited by system admins and new roles can be added

The Idea Approval and the Detailed Assessment

* Closer look at idea and assessment phases
  + Employee driven- process owner fills in assessment after idea is approved
  + CoE driven- submitter fills in assessment before sending idea to next phase
  + Both paths go to qualification after process owner either fills in or reviews assessment
* Sections of the detailed assessment
  + Automation goal
    - Main automation driver 3 options:
      * Cost, quality, or productivity
  + Environment stability
    - Expected changes in next 6 months on process not triggered by automation
    - 2 categories: process or application changes
    - Process owner must choose between 5 options for each change
  + Employee profile
    - Captures assumptions for computing FTEs and cost
    - Avg working days/year; working hours/day; avg employee full cost/year
  + Process Volumetry
    - Reflect quantitative data on existing process
    - Fill in info on:
      * Frequency, avg volume per selected frequency and avg processing time per transaction
      * Avg error rate and rework time
      * Avg work to audited and corresponding time
      * Number of employees currently performing tasks
  + Process ways of working
    - Several aspects related to predictability of process and number of steps
    - Drop down list to answer:
      * Process peaks, avg number of steps, number of ways to complete process
  + Data Input
    - Offers clarity on type and source of data input like:
      * % digital; scanned (Y/N); structured (range of %)
  + Additional information
    - System admin (Program Manager) can add up to 50 custom questions relevant to decision process
  + Applications used
    - All applications used in existing process must be listed
    - Choose options from drop down or add new items
* Outcomes of Detailed Assessment
  + Algorithm computes 3 scores
    - Feasibility-Y/N:
    - Automation potential: computed based on process and application stability (% that can be automated successfully)
    - Ease of implementation: (measures effort required to automate higher % is easier)
    - Estimated benefits
      * Hours saved/year
      * Currency/year
      * FTEs

Making the most of automation hub as a business user

* How you can contribute
  + Upvote other ideas or follow them
  + Explore and use reusable components
  + Contribute with skills and expertise on allocated tasks
* Exploring the Workspace
  + Automation pipeline
  + My submissions/collaborations/components
  + Following
* Managing tasks and notifications
* Types of tasks
  + 5 main types
    - Approve content
    - Generate content: user has collaborator roles at idea level
    - General task: linked to responsibility of adding collaborators to contribute with knowledge and make idea progress
    - Curate: later implementation phases
      * Determine which pieces of automation that can be reused by other developers
    - Support: special and handled by Program Managers and component authors covering potential component bugs or misuses of hub