UiPath Insights

Measuring RPA Why is it important?

* Why is it important to measure RPA?
  + Without performance metrics (KPIs) its difficult to demonstrate benefits to stakeholders
  + With metrics can demonstrate where RPA has most impact, plan future iterations, track ROI
* How can you measure RPA?
  + Establish concrete goals and align them with metrics that can be used to measure progress towards goals
* What can you measure?
  + Spans 2 types of insights:
    - Operational KPIs
      * Contain info relating to execution of RPA itself
        + Errors

Why

Robots may be unable to finish process if application fails or is under maintenance

How

Important to track errors and reasons to help see patterns and fix them

* + - * + Robot Utilization

Why

Important for capacity planning

Shows if robots work harder or if asking too much of them

How

Avg hours worked per day for all robots

Hours worked per day over certain amount of time

Hours worked per day for specific robots with questioned utilization

* + - * + Success Rate

Why

Failing automation is not useful

How

Aim for 90% as 100% could mean some failures aren’t being correctly tracked

* + - * + Duration

Why

Short runtimes might mean automation failed

* + - Business KPIs
      * Ties RPA deployment to how it benefits company
        + ROI

Why

Robots are scalable and can be automated to utilize savings in other areas when labor-intensive periods come up

How

Note how long a process takes a human so you can compare that baseline to how long a robot takes to do the same process to calculate time and/or money saved

* + - * + Process Outcomes

Why

Knowing what robots have accomplished is important as each automation has to achieve something

How

Apply RPA results to same metrics tracking before use of it (time taken to complete process)

What is UiPath Insights and Who is it for?

* What is UiPath Insights?
  + Analytics solution accessible from within orchestrator providing analytics capabilities using any combination of business and operational metrics
  + Comes with several out-of-the-box dashboards intended to address immediate needs from business and operational perspective
  + Created to help:
    - Measure RPA deployment
    - Optimize RPA processes
    - Scale RPA implementation
* Who is it for?
  + Users across organization from business users to RPA CoE users
    - Business users need to define, track, measure, and share process KPIs and business outcomes
    - CoE users interested in holistic view of RPA deployment
* How does Insights fit into the larger picture of UiPath’s RPA platform?
  + Platform covers all stages of RPA implementation:
    - Planning: Automation Hub, Process Mining, Task Mining, and Task Capture
    - Building: UiPath Studio and StudioX
    - Running: UiPath Robots
    - Managing: Orchestrator or Cloud Platform
    - Engaging: Action Center
    - Measure: Insights
* Some notes about Insights
  + Only available to customers with on-premises deployments so customer data will remain on-premise
  + Data stored on separate SQL database from Orchestrator
  + Works based on historical data for live data use Monitoring feature in Orchestrator

Accessing Insights and Types of Permissions

* Accessing insights
  + Prerequisite: have access to enterprise orchestrator
  + Step 1: request access to insights from orchestrator admin
  + Step 2: open insights on orchestrator tenant
* Types of Permissions
  + Viewer permission
    - What does it allow you to do?
      * Access insights page, view out-of-the-box and shared dashboards
      * Apply filters and download dashboards as PDF or images
    - What can’t you do?
      * Edit/create/delete dashboards and widgets
      * Access insights portal or configure alerts
    - Who is it for?
      * Non-technical users
      * Users needing only high-level view on data
  + Designer permission
    - What does it allow you to do?
      * Edit/create/delete dashboards and widgets
      * Access insights portal where edits are made and configure alerts
    - What can’t you do?
      * Grant other users access to insights or change permission type
      * Install/uninstall insights from orchestrator
    - Who is it for?
      * Typically for Data Analysts, Business Intelligence Specialists, RPA Developers, or Business Analysts

Interacting with the Orchestrator Insights Page

* Indicator widgets give values but can not be used as filters while bar and pie charts can be used as filters which are available for all users but are not remembered between orchestrator sessions

Quiz Questions

1. Set as Background Filter allows:
   1. Limit selectable values other users can see on filter
2. What type of UiPath platform licenses allows insights
   1. Enterprise server
3. Dashboards can be shared with users which:
   1. Belong to same Orchestrator tenant
   2. Have been granted access to insights within enabled tenant
4. What can be achieved using insights?
   1. Track and measure Robot utilization, performance, and accuracy
   2. Share business-specific insights with organization-wide stakeholders
   3. Visualize process-level automation trends in embedded dashboards
   4. Track and analyze business outcomes to guide process improvement
5. Each alert set up in Pulse can track multiple metrics?
   1. False
6. Insights allows tracking “Success Rate” of automation deployment. What is ideal success rate?
   1. 90%
7. Adding “Regression” calculation on widget allows you to predict future values based on historical data
   1. True
8. What actions can you perform in insights with Viewer permissions
   1. Apply dashboard-level filters
   2. Download a dashboard as PDF
9. What actions can you perform in insights with Designer permissions
   1. Create and delete dashboards
   2. Edit widgets
   3. Create alerts
   4. Share dashboards
10. What conditions need to be met for you to be able to access insights page on Orchestrator?
    1. Tenant must have insights enabled
    2. Must have been granted access to insights functionality by orchestrator admin
11. Users with same email saved across multiple Orchestrator tenant able to access data from all tenants in insights
    1. True
12. You have “owner” rights on dashboards for dashboards:
    1. You created
    2. Shared with you by other users and you have duplicated it
    3. Ownership has been transferred to you by original owner
13. Who can benefit from insights?
    1. CoE leads
    2. Business/ process owners
    3. RPA business analysts
    4. Business executives
14. Can add custom data to insights using:
    1. Robot logs
    2. Queues
15. Average utilization for attended robot is calculated on scale from:
    1. 0-8 hours per day
16. Average utilization for unattended robot is calculated on scale from:
    1. 0-24 hours per day
17. Can you import dashboard created on another orchestrator tenant by you or another user?
    1. Yes, by importing it as a DASH file from local machine or shared directory