

Checklist REF with Queue Items

Prerequisites

Robot connected to Orchestrator;

Queue created in Orchestrator:

Set the Retry value as required in the process documentation (PDD, SDD).

Configuration in UiPath Studio

Create **new project** using the *Robotic Enterprise Framework* template:

Set a proper name for the project – based on the name of the automated process;

Set a proper description for the project.

Edit the project's **configuration file**, found in the project folder, *Data/Config.xlsx*:

Settings sheet:

Set the correct value for the *OrchestratorQueueName* parameter; use the same name as the queue created for this process in *Orchestrator*;

Set the correct value for the *OrchestratorQueueFolder* parameter; you can leave it empty if the queue is in the same folder with the process.

Define any additional parameters required for the process such as input file paths, application paths, parameters to control the automation flow, emails, etc.

Credential assets should also be defined in this sheet, instead of the Assets sheet.

Constants sheet:

Leave the *MaxRetryNumber* value to 0; we will use the retry mechanism at queue level, if required;

Optionally, you can change the values of the other items defined in this sheet according to the process being automated.

Assets sheet:

Add entries for all assets defined in Orchestrator for this process (except credential assets);

Save and close the *Config.xlsx*.

Applications Used: open/close/kill

Edit the **Framework/InitAllApplications.xaml** workflow; it should contain the activities to start all the applications, perform the authentication and initial configuration required for all transactions in the process; 

Edit the **Framework/CloseAllApplication.xaml** workflow; invoke here the activities that should logout and close the applications opened in the *InitAllApplications.xaml* workflow; 

Edit the **Framework/KillAllProcesses.xaml** workflow; place here the activities to force close the applications used in the automaton, if required by the process. 

Business Process: Transaction Data and Process

Edit **Framework/GetTransactionData.xaml** workflow:

Set a proper value for the *out_TransactionID* argument, in the Assign *out_TransactionID* activity; 

Set proper values for *out_TransactionField1* and *out_TransactionField2* arguments in the next two assign activities. 

Edit **Framework/Process.xaml** workflow:

Place all the activities and logic required to process one transaction. 

The UiPath Platform



The primary difference between a fully automated enterprise and a traditional enterprise is their approaches to automation.

A fully automated enterprise thinks “automation first” and applies automation where it makes the most sense and can have the greatest impact. It also understands the people requirements and nurtures and grows the talent needed to operate the automations.

Select each logo to find out more about each product.

Discover

Discover automation opportunities powered by AI and your people

UiPath™ Automation Hub

What it does?

Captures automation ideas from those who know the work best: the employee themselves. Brings together all the right people in the organization, including IT and Business Partners to drive automation opportunities.

Users

CoE Leadership, the C-Suite, Business Users

Example

Jane from the marketing team, needs an automation that updates the assets on a public platform. She submits the idea and if approved, the CoE will pick it up and develop the automation.

UiPath™ Task Capture

What it does?

Looks at how specific processes are carried out by task experts - the workers who do the tasks the most. When started, it registers the process details as the expert performs them.

Then, it exports screenshots, step by step details, and detailed annotation in a PDD or XAML to be used further in the Build phase.

Users

CoE Leadership, the C-Suite, Business Users, RPA Developers, Business Analysts

Example

Brian, from the Finance department, uses Task Capture to document the specifics of an SAP task to be automated by the RPA team.

UiPath™ Process Mining

What it does?

Uses the digital footprints left behind in your systems and applications to create a digital representation of end-to-end business processes. Discovers automation-ready pain points, deviations, and inefficiencies across processes.

Users

Business Process Owners (eg. Head of Procurement, Contact Center Owner, Head of Logistics), Automation/RPA Leads, IT C-level

Example

Analyzing an invoice process through Task Mining to find improvement opportunities throughout the process. Once identified, a process step is sent to the automation team to be analyzed for automation potential.

Build

Build automations quickly, from the simple to the advanced

UiPath™ Task Mining

What it does?

Uses AI to automatically capture and analyze the day-to-day tasks performed by the employees, construct the data-driven process maps, and suggest automation ideas with the highest ROI potential.

Users

Business Users, RPA CoE

Example

Recording Excel and SAP desktop activities of a team for one week, and then deploying an ML model to analyze the recorded data and identify the repetitive tasks performed across the team.

UiPath™ Studio

What it does?

It allows RPA developers to create workflows, with API integrations to an ever-growing list of applications, technologies, and platforms. More complex automations are easily handled with basic coding knowledge.

Users

RPA Developer, Business Decision Maker, Business User

Example

Developing an automation that tracks licenses assigned to a team and allocates or removes them based on usage.

UiPath™ StudioX

What it does?

Enables business users to rapidly automate without the need for developer resources or coding, making automation accessible to all.

Users

Business Users, Subject Matter Experts

Example

Downloading attachments from specific emails and then compare the data across the downloaded files.

UiPath™ Studio Pro

What it does?

Empowers RPA developers with all of the benefits of Studio plus advanced scaling capabilities to continuously automate testing of RPA workflows and the applications they rely on, including web, mobile, SAP, and virtualized desktops.

Users

RPA Teams, Test Teams, Transformation Leaders

Example

Developing a Workday automation for onboarding employees, and then building Test Cases for various functions around the onboarding process in Workday.

UiPath™ Document Understanding

What it does?

Uses AI-enhanced skills to extract data and interpret documents. It can process different document types and formats, including tables, handwriting, signatures, and checkboxes. Uses human validation to confirm extracted data if needed, handle exceptions, and train models to improve their accuracy over time.

Users

RPA Developers, Business Process Owners, CoE members, CIOs

Example

Extracting data from employees' ID cards and Passports.

UiPath™ Integrations

What it does?

Helps you automate processes that involve multiple applications and/or lines of business using deep integrations with best-in-breed technologies. Leverages API integrations with leading enterprise applications, built and supported by UiPath and backed by partners.

Users

RPA Developers, Business Users, CoE members

Example

Automating mortgage application processes using the UiPath integration with Adobe Sign. In this automated process, clients can sign documents on any device –including mobile.

UiPath™ Marketplace

What it does?

Enables consumers to discover and use trusted, enterprise-grade RPA content. Gives vendors a easy way to distribute RPA solutions to thousands of customers.

Users

RPA Developers

Example

Downloading a Studio project developed to delete history, cache and cookies from Internet Explorer, Chrome and Firefox and integrating it into an automation project.

Manage

Manage, deploy, and optimize automation at enterprise scale

UiPath™ Orchestrator

What it does?

Deploys, manages and optimizes your Robots with enterprise-scale integrations and compliance.

Users

RPA Developer, IT Admin, CoE Admin

Example

When a certain number of invoices to be processed are added to queue, the robot is triggered and starts processing them.

UiPath™ Test Manager

What it does?

Governs and monitors the quality of the automations. It facilitates test planning and execution, requirements, and defect traceability, includes comprehensive test reporting, and seamlessly adapts to environments with out-of-the-box integrations.

Users

RPA Teams, Test Teams, Transformation Leaders

Example

Connecting ServiceNow with UiPath Test Manager and automating ServiceNow Test Cases with UiPath Studio Pro.

UiPath™ AI Center

What it does?

Facilitates the automation of more complex or cognitive processes with RPA robots learning AI skills. Enables you to deploy your own AI skills or pre-trained AI skills developed by UiPath or UiPath AI technology partners.

You can also monitor and manage your AI skills, train and improve them using human validated data.

Users

RPA CoE, RPA Developers, and Business Users

Example

Creating an ML model to classify product feature requests, training Out-of-the-box ML model to extract data from invoices .

UiPath™ Insights

What it does?

Using powerful embedded analytics you can measure, report, and align RPA operations with your specific KPIs and strategic business outcomes.

Example

Sharing business-specific metrics with organization-wide stakeholders.

Users

RPA Analysts, Business Leadership, Line of Business Owners, Business Process Owners

UiPath™ Data Service

What it does?

A powerful no-code data modelling and storage tool that ensures seamless access, enterprise-grade security, and scalability of the data.

Example

Having one source of data for multiple attended and unattended automations.

Users

IT Leader, RPA CoE Lead, Business user (Business Analyst), RPA Developer, IT Architects

UiPath™ Robots

What it does?

Run automations with software robots that are intelligent, flexible, and eager to take on tedious tasks.

Example

UiPath robots run automations. Any UiPath automation example you might find is performed by a robot.

Users

CoE Lead, Business Decision Maker, Technical Decision Maker, RPA Developer, Automation User

UiPath™ Assistant

What it does?

Lets all the users interact with robots right on their desktops through an easy-to-use launchpad.

Example

Starting the day by running an automation that logs into all the needed applications. Running on-demand an automation that edits a Powerpoint file with data from a Sharepoint Spreadsheet.

Users

Automation User

UiPath™ Action Center

What it does?

Brings humans in the loop to make required decisions when the automated processes require exceptions, escalations, and approvals.

Example

Contracts that were marked as “incomplete” by a Document Understanding process are sent to Action Center where they can be picked up by the person responsible.

Users

Automation Users, RPA Analyst and System Admin, Process Architect, RPA Operations Head



What it does?

Enables you to build, use, and share elegant business apps that interact with your automations.

Example

Consolidating data from dozen of applications used daily into one interface.

Users

C-Level, IT Leader, RPA CoE Lead,
Automation User, Citizen Developer, RPA Developer,
IT Manager



What it does?

Connects chatbots with UiPath processes for the fulfillment of user requests without writing a single line of code.

Example

A chatbot that helps employees create new service requests in ServiceNow.

Users

C-Level, IT Leader, RPA CoE Lead,
Automation User, Citizen Developer, RPA Developer,
IT Manager



Measure & Govern

Measure and govern automation programs to align with business outcomes

The UiPath Platform includes many capabilities designed to allow you to measure and govern your automation program at all stages of the lifecycle. For example, there are rich role-based access controls that work with your account directories. You can govern how

You can govern how automations are built and what users can do with them. Measurement of both operational and business results helps you run an effective program and maximize your return on automation.