

A dramatic photograph of a space shuttle launching from a launchpad. The shuttle is ascending vertically, leaving a massive, bright white and orange plume of smoke and fire behind it. The launchpad's service structure is visible to the left of the shuttle. The sky is a hazy, golden-brown color, suggesting a sunrise or sunset. The overall scene is one of power and technological achievement.

# Training Academy

Automation

Bootcamp and  
Intelligent  
Automation Demo



## Course Path

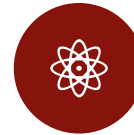
Introduction  
to Intelligent  
Automation and  
UiPath Overview



User Interface  
Automation  
and Project  
Notebook



Microsoft  
Office  
Automation



Automation  
Bootcamp and  
Intelligent  
Automaton Demo



StudioX and  
Planning Your  
Automation



Decisions,  
Iterations and  
Scenarios with  
StudioX



Error Handling  
and  
Automation  
Lifecycle

# Agenda

1. Recap of Module 6
2. Automation Bootcamp
  - a) Forwarding Inventory Data
  - b) The Reconciliation of Two Reports
3. Demo: Human In The Loop
4. Career Paths
5. Special Guest Speaker
6. Closing Remarks





# Topic

# 1

Recap of Module 6



## RPA Platform Comparison – Features



Why do clients choose this product?



- Seamless integration with Microsoft Office/Dynamics 365 suite
- RPA and RPA capability
- Citizen Developer enablement
- Great Microsoft community support

- Efficient development at scale
- Ability to deploy bots rapidly with minimal IT infrastructure cost when scaling
- Centralized control system provides greater management of virtual workforce and scheduling

- Product road map, vision and strategy
- Ease of system integration & Remote Desktop strength
- Capability to automate processes with multiple systems easily
- Attended automation

- Easy to use out of the box
- Good balance between ease of use and features
- Financial/Organizational viability
- Great technical, customer and account support for implementations

Leading when compared to Competitors



- Security and compliance
- Low-code desktop automation solution (with Softomotive)
- Attended automation
- Native Integration with Microsoft 365 and Dynamics 365

- Implementation
- Security and compliance
- Reusability
- Robot management
- Scalability
- Lower technical skill requirements

- Process development
- Development tools
- Data extraction
- System & workflow integration
- Product strategy and roadmap
- Attended automation

- Technology roadmap
- Support provided via customer success managers, technical support and account executives
- Implementation
- Ease of deployment (Bot Lifecycle Management)

Lacking when compared to Competitors



- Scalability
- Implementation
- Debugging capability

- Attended automation
- Recording capability
- Product road map

- Required skills and ease of use
- Complex license model
- More expensive than competitors

- Required skills for more advanced automations and ease of use
- Complex role permissions
- Debugging capability



**As you continue your automation journey, you will soon find out that handling errors plays an important role in your automation journey!**

Learning to automate your tasks can be a frustrating endeavor because you are destined to encounter errors along the way. What will make you successful isn't avoiding errors—no one can avoid them. Instead, you should understand that errors are part of the process and know how to find the solution to each while learning something new from them.

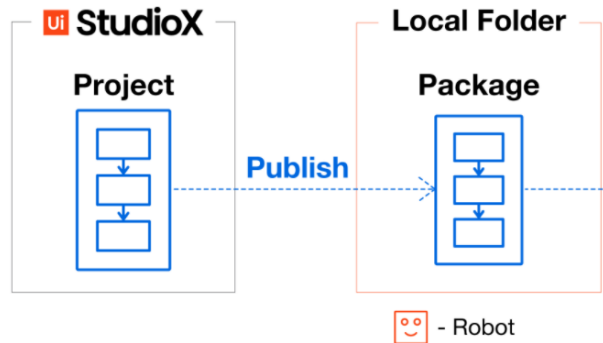


### How to start?

StudioX comes with two tools that will help you anticipate some errors. These are called **Validate** and **Analyze** and are both found under the **Analyze** dropdown.



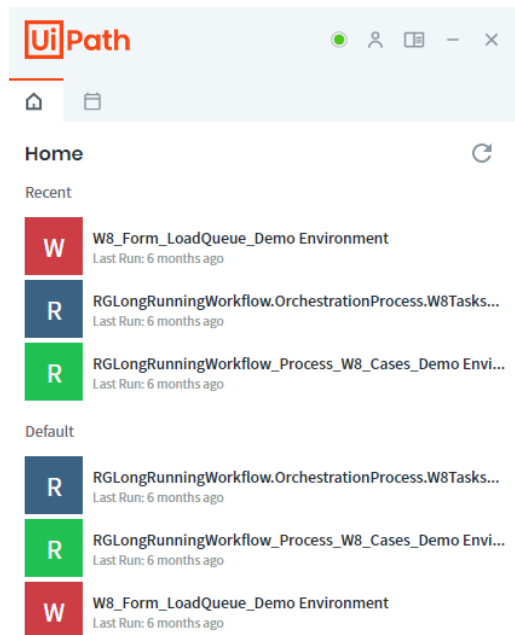
## Publishing and Running



### Publishing

After completing your automation, you click the Publish button at the top.

Follow the steps to confirm it saved locally



### Running

Go to the Window's tray and select UiPath Assistant.

Click on the new Process and make sure it is installed.

Click the Icon to run

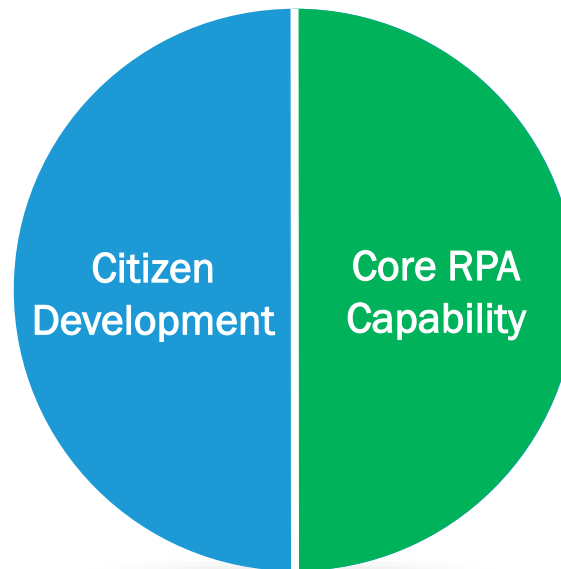


The most successful Intelligent Automation programs utilize both citizen-led and a dedicated development team to promote a cultural shift towards operational excellence through automation

## Citizen Development vs. Core RPA Capability

### Citizen Developer Lifecycle

- Task based automation
- Automation built by the person who performs the process
- Manually triggered and runs on the desktop
- Linear sequence of actions with manual intervention
- Task performed in 1-2 applications



### Standard RPA Delivery methodology

- End-to-end process automation
- Automation built by a dedicated delivery team
- Event driven or scheduled and runs without monitoring
- Handles multiple decisions points and referral handling
- Process utilizes multiple applications





# Topic

# 2

Automation Bootcamp



# Topic

2a

Forwarding Inventory Data



## RPA in Manufacturing

Manufacturers already implement physical industry robots to assemble, test, and package their products. Despite these robots being able to help streamline the assembly line, the manufacturing industry still struggles to maintain control over managing its back-office and operational processes.

Manufacturers must juggle labor and time-intensive processes such as customer communication, procurement, inventory management, and payment processing. At the same time, they have to maintain cost reduction and innovative business practices. In order to overcome these pain points, many manufacturing companies are turning to RPA for improved agility and more streamlined operations across the value chain, resulting in up to a 20% cost savings across various touchpoints.





## Automation Practice: Forwarding Inventory Data

Let's assume you are a Supply Planner for a Food industry company.

Your tasks include extracting inventory data from your vendors and forwarding it further to your team. If you take into consideration that you need to do this for hundreds of vendors, RPA is quite a helper.

**Step 1:** Open <https://acme-test.uipath.com/reboot-your-skills>. This will be the website you will be using.

**Step 2:** Click on the Vendors button.

**Step 3:** Trigger the download by clicking on the Download Vendor List option.

**Step 4:** Open Vendors sub menu again

**Step 5:** Click on the Vendor Inventory option

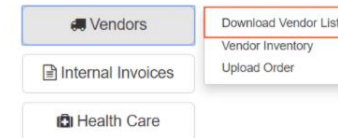
**Step 6:** Select the Vendor for which you want to check the Inventory

**Step 7:** Copy the Table Data for each Vendor

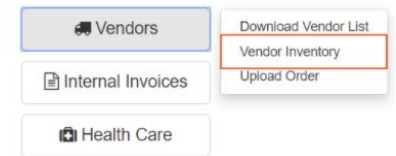
**Step 8:** Save the Vendor's inventory information into a CSV file with the following naming structure: Inventory\_[Vendor Name]\_YYYYMMDD.csv

**Step 9 (optional):** Email the requested information

Welcome to System 2.



Welcome to System 2.



Vendors - Vendor Inventory

Home / Vendors - Vendor Inventory

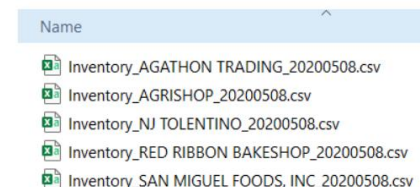
Please enter the details of the vendor you wish to check, by subsequently filling the following form.

Vendor Code:

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	A	B
1	Supplier code	Supplier
2	DE325476	AGRISHOP
3	FR006748	AGATHON TRADING
4	IT145632	NJ TOLENTINO
5	RO094782	RED RIBBON BAKESHOP
6	RL567434	SAN MIGUEL FOODS, INC
7		
8		

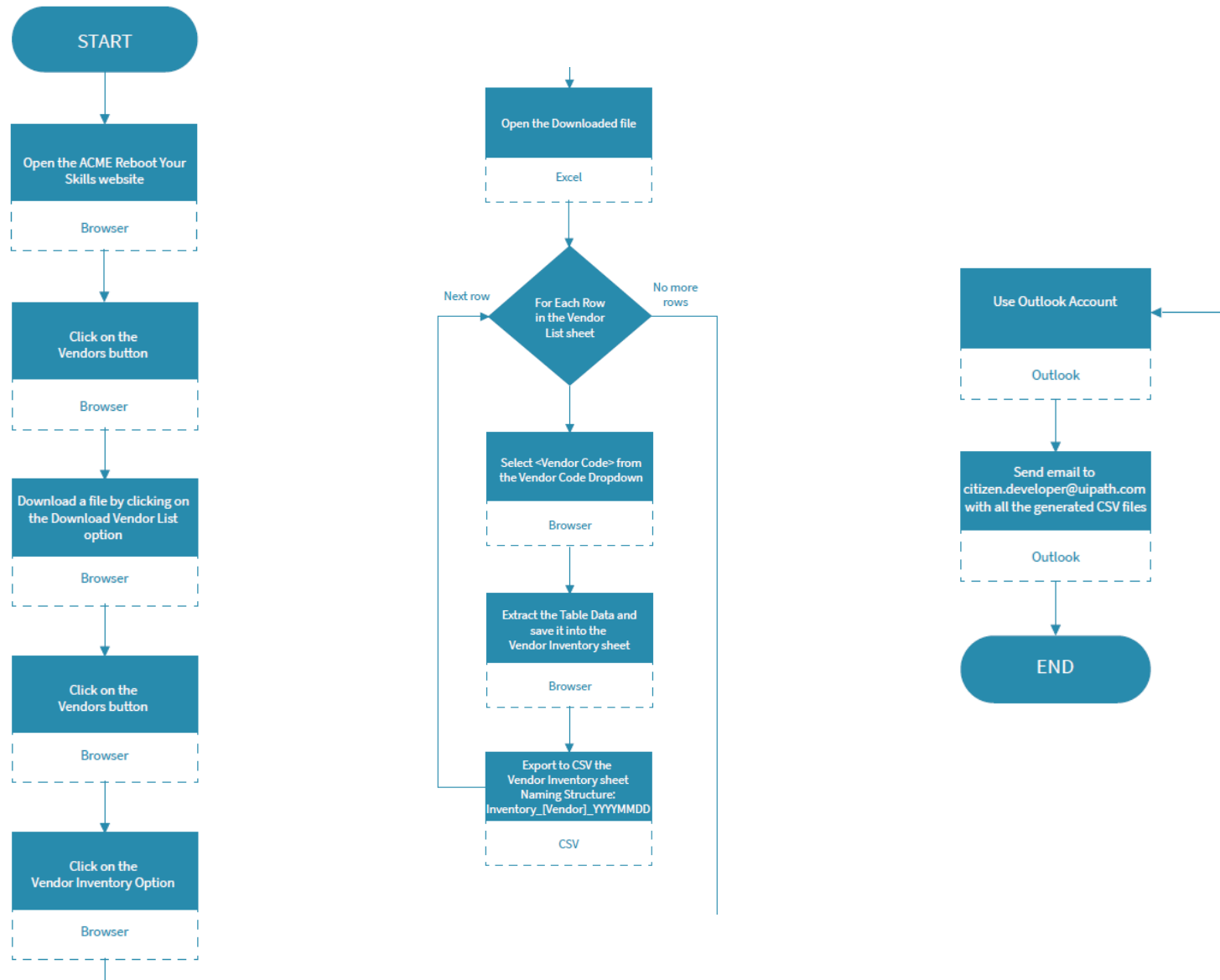
Vendor list







## RoboPath: Forwarding Inventory Data





# Topic

2b

The Reconciliation of Two Reports



## Automation Practice: Reconciling Two Reports

When we think about an industry that might hold the most automation potential, the first that comes into mind is Finance and Accounting. Being part of any institution's core daily operations, it involves manipulating large data sets and predictable manual work that tends to overwhelm the staff.

Operations such as budgeting, forecasting, reporting, order to cash, or source to pay, to name a few, have been identified as great contenders for automation. You may wonder why? The answer is simple: most of the processes involved are repetitive!

Activities, like manipulating complex sets of data or downloading and storing files periodically, can benefit from the power of automation and we will understand why in the following practice!









## Automation Practice: Reconciling Two Reports

Download the file: Reconciliation Process – Robot Path.PDF

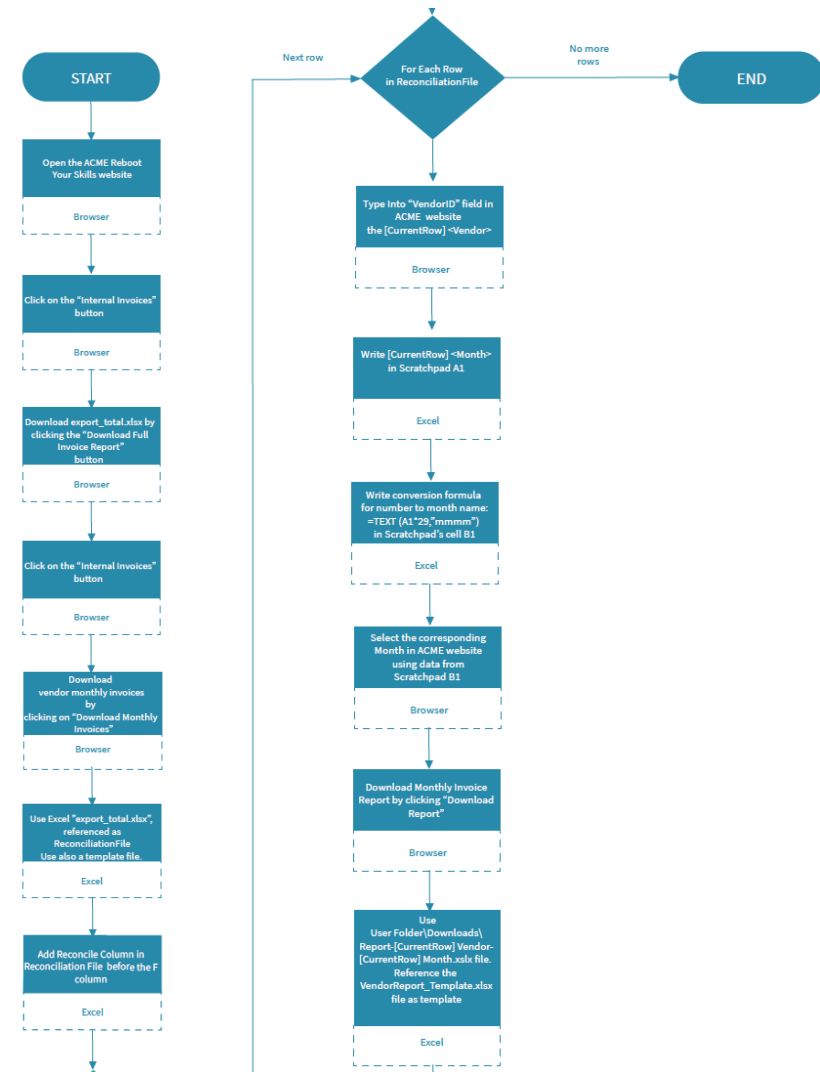
### TIPS

Use the working documents from the zip file or download them yourself from the ACME webpage when you start building the automation. We recommend downloading them from the website.

Remember, if you have an Excel file which you will use throughout the automation, you may want to save it as a template.

When downloading something, use the appropriate action. This will ensure that the robot waits until the download finishes before moving to the next activity.

For the robot to start downloading each monthly invoice you have to instruct it to convert each Month from the Reconciliation File from number to text. Use the Scratchpad for this operation and if you don't know the formula, don't hesitate to look for it online! (TIP: it's in the RobotPath)





## New Action Used: Download File

Download file action will detect whether a file is being downloaded when clicking on a button.

The file will then be saved in a folder but, can also be referenced for future use

1.2 Download File

We used a Download File action placing inside it, a click activity, for the robot to click on Full Invoice Report. We saved the file as value for later use, naming it ReconciliationFile.

We then run the automation up to this point using Run to this Activity!

Activity to initiate download

1.2.1 Click 'Download Full Invoice Report'

Invoices

Download Monthly Invoices

Download Full Invoice Report

Click typeSingleMouse buttonLeft

Downloads folderUser Folder\Downloads\

Downloaded fileReconciliationFile

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# Topic

Human in the Loop

3



## Addended vs. Unattended Automation

### Attended Automation



#### Front Office Automation

Configure bot to work together with the human

### Unattended Automation



#### Back Office Automation

Fully automate by teaching the robot how to do it



### Intelligent Automation

#### Cognitive Automation

Machine Learning and AI used in processing across functions







## What is Attended Automation?

### CHARACTERISTICS



- Used in business processes which require **human communication** or **oversight**
- Often used in **front-office, client facing** activities and deployed on user desktops
- Typically used in **smaller, fragmented** processes, consisting of **repetitive** tasks and **requiring human** judgement and involve a handoff between bot and human within the workflow

### 2 MAIN TYPES



#### Human-In-the-Loop

- **Not** installed on human machine
- User does **not consume** bot licence
- Bot **elevates task** to human users for input
- Inclusion of a human in an end to end process completed by unattended bots
- User logs into **task management tool** to work assigned tasks
- Tasks are then **handed off to a bot** to complete the process

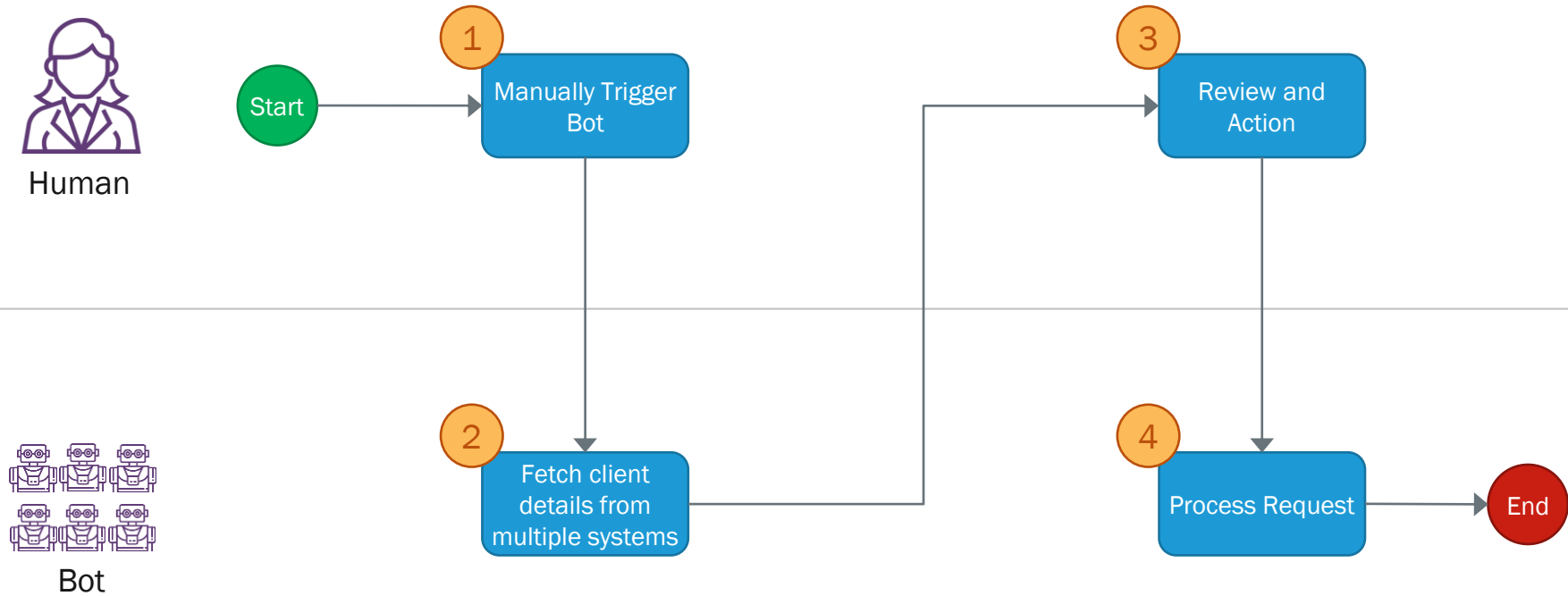


#### 'Pure' Attended Automation

- Installed on the user's desktop
- User **consumes** a bot license
- Gather on-demand data from **multiple systems** for human consumption
- Bot **enhances human workforce** – improving productivity by speeding up repetitive tasks
- Humans **supervise** bot as it executes tasks in front of them



## 'Pure' Attended Automation – Simple Call Center

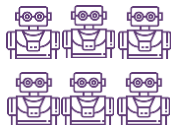




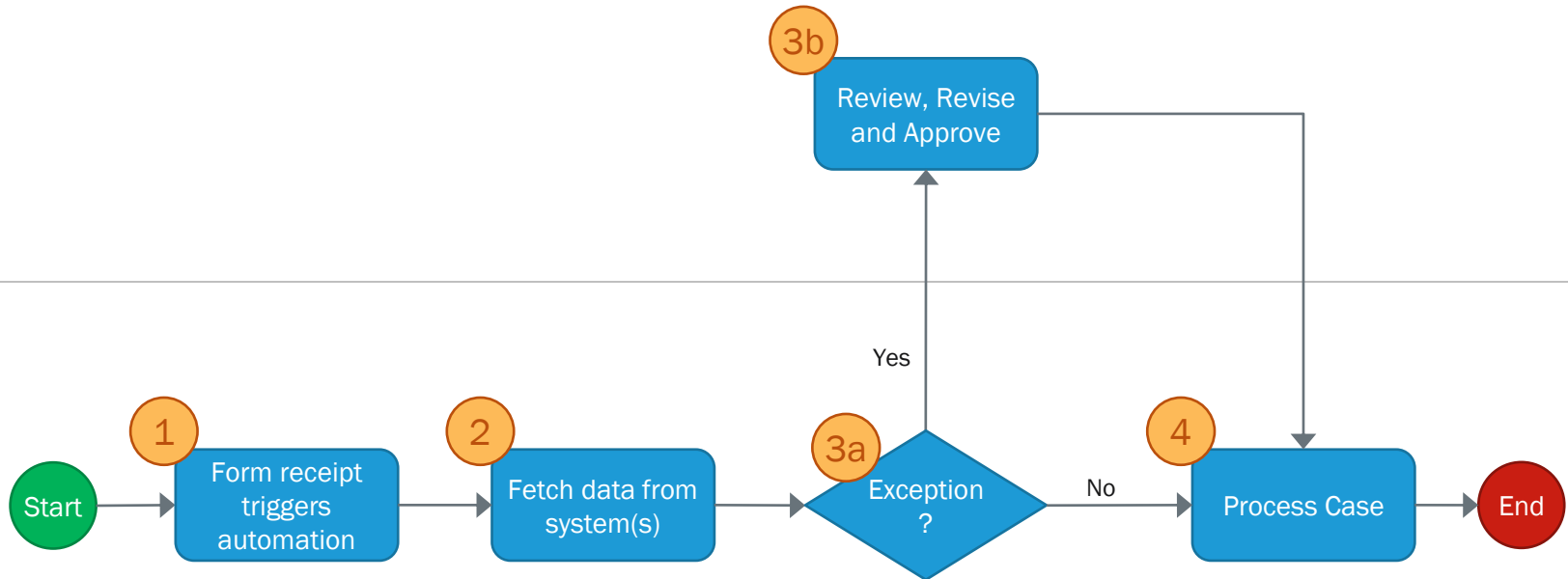
## Human-In-the-Loop: Simple Form Processing



Human

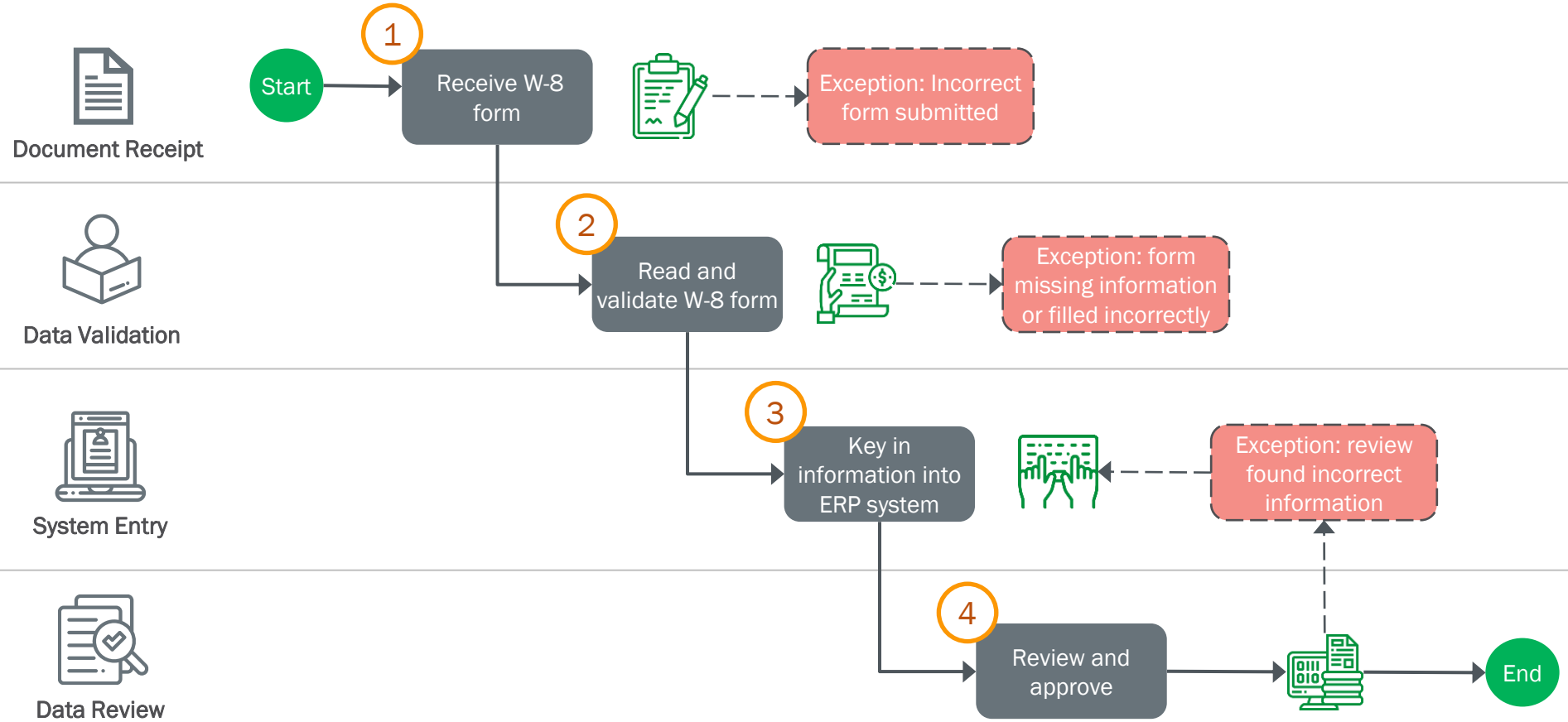


Bot





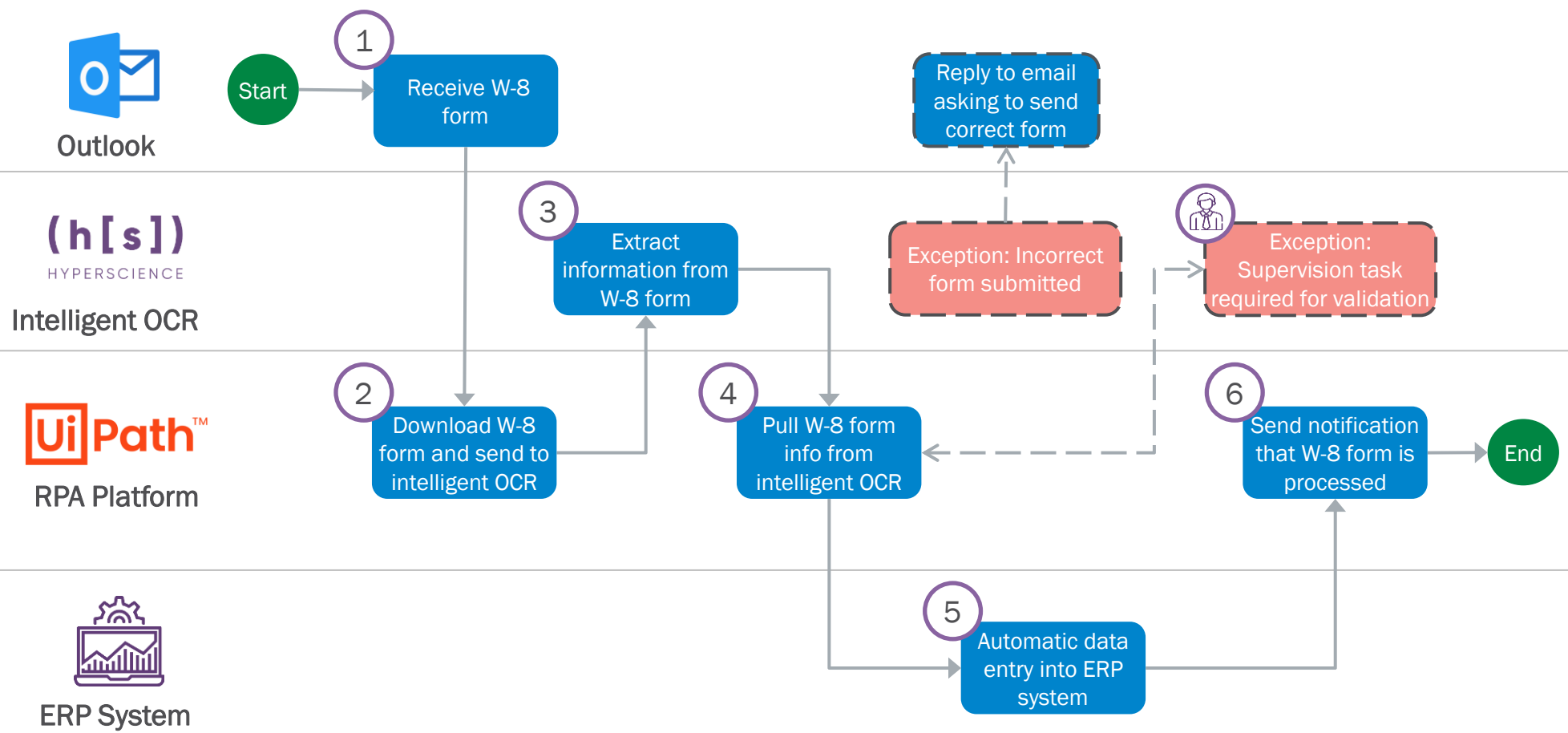
# Process Map: Current State Overview





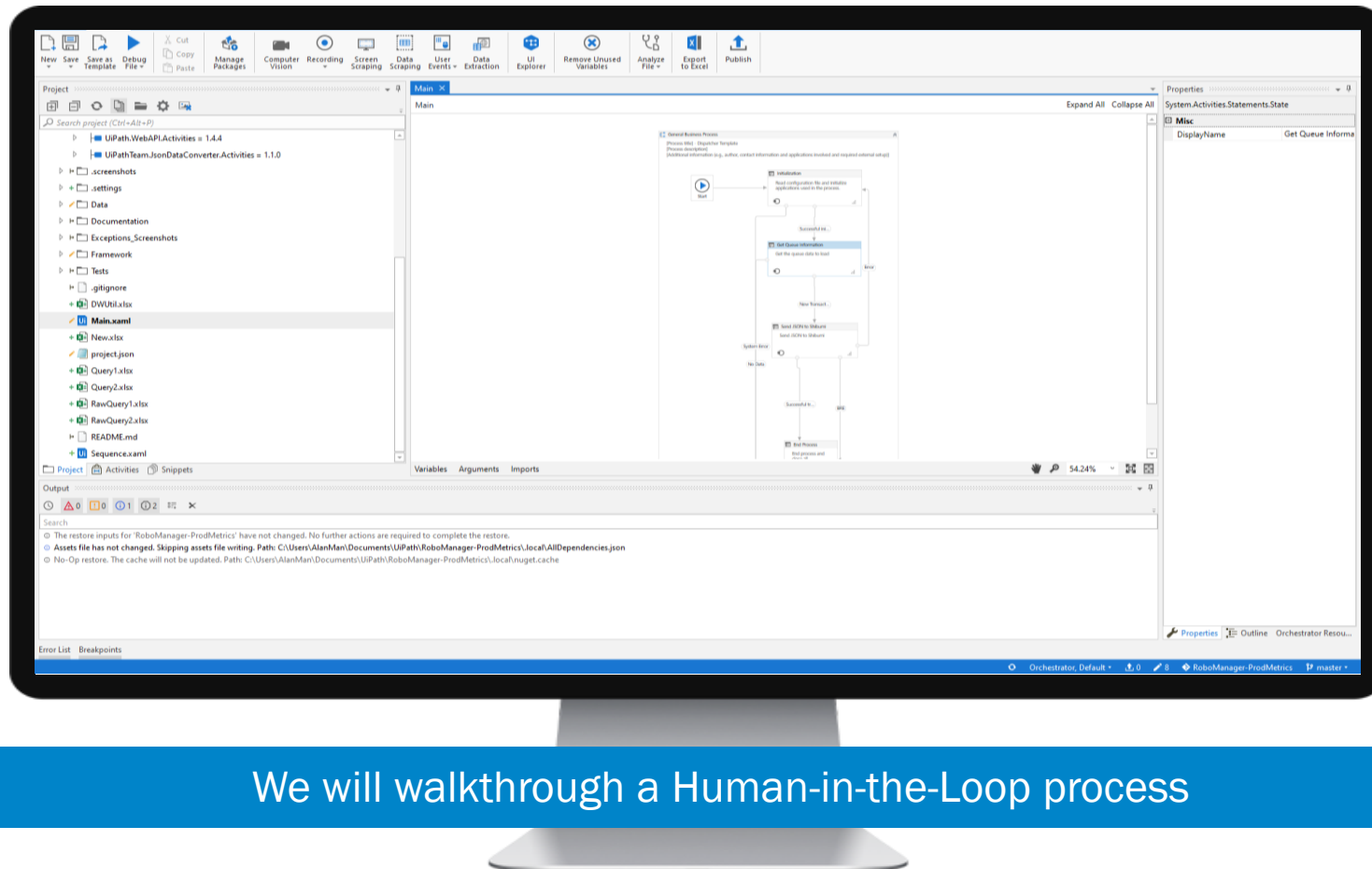


# Process Map: Future State Overview





# UiPath Live Demo



We will walkthrough a Human-in-the-Loop process



# Topic

Career Paths

4



As you embark on your own personal Career Journey here are some roles in an Automation COE



**Citizen  
Developers**



**Delivery  
Leads**



**Business  
Analysts**



**RPA  
Developers**



**Process  
Controllers**

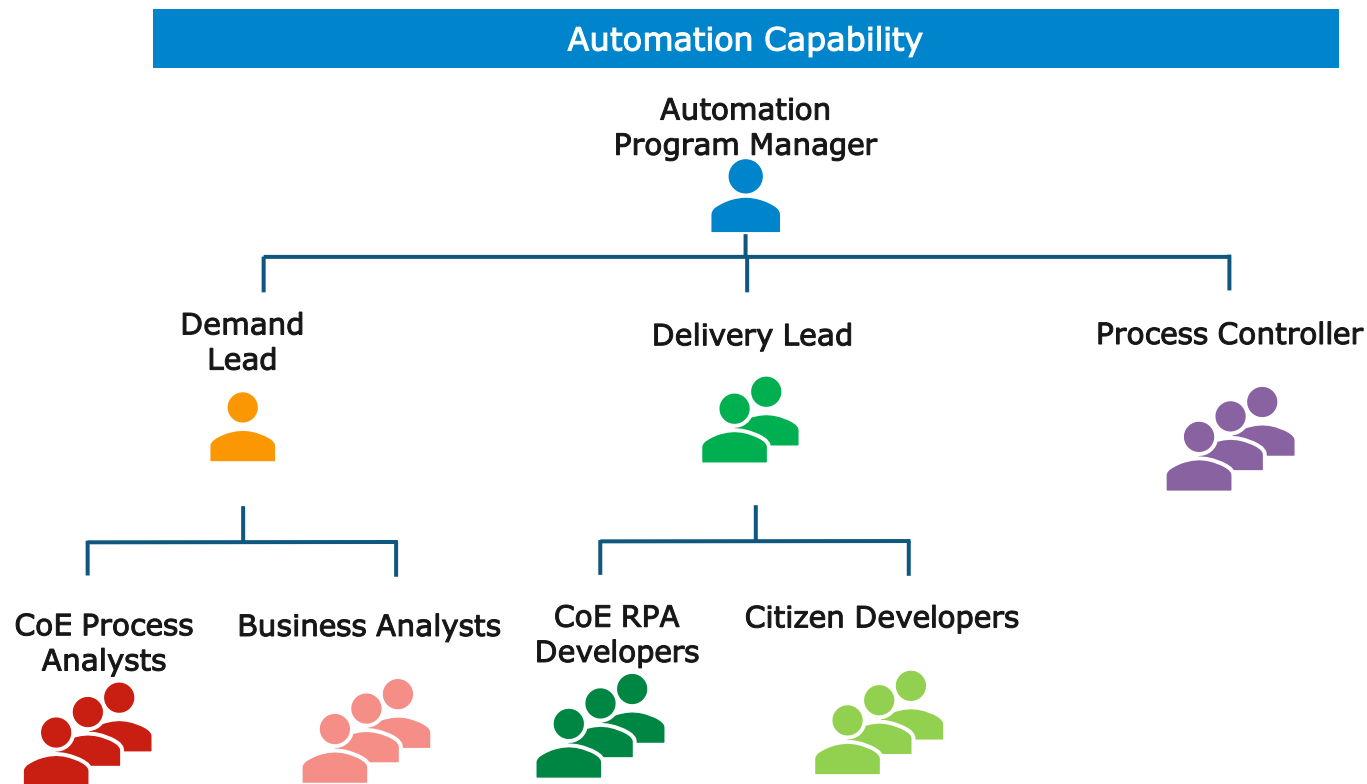


**Automation  
Program  
Managers**



# There are Several Roles Involved in Successful Automation Program

## Automation Program Organizational Design







As you embark on your own personal Career Journey here are some roles in an Automation COE

Citizen Developers	Delivery Leads	RPA Developers
<p>Responsibilities</p> <ul style="list-style-type: none"><li>- Works with members of the RPA CoE team</li><li>- Development of self-identified automation opportunities</li><li>- Produce required documentation for the automation to be shared</li><li>- Shares automated solutions with the business function</li></ul> <p>Background &amp; Skills</p> <ul style="list-style-type: none"><li>- Foundational training or Citizen developer training on the automation platform</li><li>- Experience creating non-technical documentation</li><li>- Effective communication skills</li></ul>	<p>Responsibilities</p> <ul style="list-style-type: none"><li>- Provides leadership and mentoring for RPA Developers</li><li>- Ensures design principles and standards are followed for automations created by RPA Developers</li><li>- Manages RPA deliveries</li></ul> <p>Background &amp; Skills</p> <ul style="list-style-type: none"><li>- Experience delivering multiple complex automations as an RPA Developer</li><li>- Experience leading projects</li><li>- Communication and stakeholder management</li></ul>	<p>Responsibilities</p> <ul style="list-style-type: none"><li>- Build the automation from End to End</li><li>- Ensure adherence to Delivery Methodology</li><li>- Follow company's design principles, configuration standards and testing Approach</li></ul> <p>Background &amp; Skills</p> <ul style="list-style-type: none"><li>- Developer Certification in the Automation Platform</li><li>- Technical background (coding not essential)</li><li>- Experience in creating technical and non-technical documentation</li><li>- Effective communications skills</li></ul>



## As you embark on your own personal Career Journey here are some roles in an Automation COE (continued)

Process/Automation Controllers	Business Analysts	Automation Program Manager
<p>Responsibilities</p> <ul style="list-style-type: none"><li>- Monitors the automations in production</li><li>- Maintains the automation schedule to manage the digital workers</li><li>- Ensures the business are receiving appropriate information for any actions required after automation is completed or referred.</li></ul> <p>Background and Skills</p> <ul style="list-style-type: none"><li>- Foundational training of the RPA platform</li><li>- Exposure to RPA development</li><li>- Time management and communication skills</li></ul>	<p>Responsibilities</p> <ul style="list-style-type: none"><li>- Work closely with business to validate processes for automation</li><li>- Perform detailed process walkthroughs for thorough understanding of the process</li><li>- Ensure all required information is collected for business case development</li><li>- Ensures RPA is the correct tool to improve the process</li></ul> <p>Background and Skills</p> <ul style="list-style-type: none"><li>- Business analysis and requirements gathering</li><li>- Process modelling and mapping</li><li>- Process improvement background preferred</li></ul>	<p>Responsibilities</p> <ul style="list-style-type: none"><li>- Coordinates projects for the RPA teams for deliveries.</li><li>- Facilitates the prioritization and scheduling of automations for RPA deliveries.</li><li>- Facilitates RPA status meetings and reporting to stakeholders.</li><li>- Manages business stakeholders</li></ul> <p>Background and Skills:</p> <ul style="list-style-type: none"><li>- Project management experience</li><li>- Time management and communication skills</li><li>- Stakeholder management experience</li><li>- Understand of Intelligent Automation</li></ul>



# Topic

# 5

Special Guest: Brian Pedron  
Roche Canada



# Topic

## Closing Remarks

6



## Thank You

- Expectations Met?
- Feedback For The Next Semester
- Stay In Touch!



**Note:** For Letter of completion email: [learn@utoronto.ca](mailto:learn@utoronto.ca) requesting letter of course completion for 3757. The letter can usually be issued within 48 to 72 hours.