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UiPath training: RPA application

3 days (21 hours)

Presentation

Put an end to recurring manual tasks with UiPath. With this tool, you can automate your workflows. UiPath is one of the most popular RPA tools, and for good reason: this program will enable you avoid human error and make substantial productivity gains.

During our UiPath training course, you'll discover a leading RPA technology. A service that will help you save resources, protect you from errors and rapidly scale your business.

Following an introduction to RPA, we'll train you in the use of UiPath, and show you how to automate your workflows using the tool's features such as OCR recognition and email automation.

This course covers the use of Studio and StudioX, the creative process, flowcharts and sequences.

Objectives

- Master the specifics of UiPath Automation Cloud (SaaS)
- Automate business processes with native cloud services (Serverless, AI Center, Web Studio)
- Exploit exclusive cloud features: Autopilot™, Document Understanding, APIs Management
- Implementing cloud governance with Automation Ops

Target audience

- Project managers who want to automate their business tasks

- Financial managers
- Technical managers
- Product Owner

Prerequisites

- Basic knowledge of RPA (ideal but not mandatory thanks to AI cloud assistants)

UiPath training program

Introduction to UiPath Automation Cloud and environment structuring

- Overview UiPath Automation Cloud (SaaS platform, available services, automatic updates)
- Components and terminology: organization, rationale, licenses, services (Orchestrator, Insights),
  Automation Ops, etc.)
- Best practices for organizing your cloud instance (using multiple tenants or folders to separate environments)
- Navigating the UiPath Automation Cloud portal interface
- Browse the cloud portal and show the various services
- Create an Orchestrator service (tenant) and explain its parameters (name, region, etc.).
- Explore an existing tenant to present its components (robots, machines, assets, tails).
- Practical exercise: create a test tenant in which they identify and note the various interface components.

Access, user and role management

- User invitation process via the Automation Cloud portal.
- Roles at organization level and in Orchestrator.
- Create and modify custom roles and manage groups/folders.
- Invite a user and assign them a specific role.
- Illustrate role modification and access restriction (e.g. a user without "Edit" rights cannot modify a process).
- Practical exercise: configure the addition of a user with a predefined role on a test tenant

Robot provisioning and license configuration

- Description of the different types of robots and their use cases
- How to create a machine in Orchestrator and configure a robot (classic and modern methods)
- License management (allocation, consumption tracking)
- Create a machine and a robot in a demonstration room
- Connect the robot via UiPath Assistant and show it as "Connected" in Orchestrator
- Navigating the license management interface

- Practical exercise: create a robot following the provisioning steps, allocate the corresponding licenses and validate the connection.

Practical exercise - Setting up a complete environment

- Create the tenant via the Automation Cloud portal
- Allocate the necessary licenses
- Invite a user and assign the appropriate role
- Create a machine and a robot, then connect the robot via UiPath Assistant
- Check that the robot appears "Connected" and test a small process (e.g. a "Hello World" workflow).

Advanced supervision and monitoring via Orchestrator and Insights

- Orchestrator monitoring features: job view, detailed logs, queues
- Overview of UiPath Insights and the types of reports available
- Configure automatic alerts and notifications
- Launch a live process and display its logs in Orchestrator
- Create a simple dashboard in Insights, filtering by period and process
- Set an alert (e.g. robot disconnected)
- Practical exercise: analyze a fictitious incident by consulting logs, configure an alert and propose corrective actions.

Centralized governance and policy enforcement Automation Ops

- The concept of RPA governance and the risks associated with the absence of standards
- Overview Automation Ops: creating and deploying policies (e.g. prohibiting unapproved activities)
- Deployment methods and policy targeting (by tenant, user group)
- Access Automation Ops interface and create a policy for Studio (e.g. disable an unauthorized activity)
- Deploy the policy on a test tenant and illustrate the effect in Studio (screenshot or video)
- Practical exercise: develop a simple policy and deploy it in a test environment, then simulate its impact on a process.

Secure access and credential management

- Good security practices: strong authentication, access segmentation, principle of least privilege
- Managing asset credentials in Orchestrator: creation, management, restrictions
- Integration options with external safes and their advantages (centralization, auditing, password rotation)
- Create a Credential asset in a tenant and show its security settings
- Illustrate the theoretical configuration an external safe in Orchestrator (via screenshot or prepared guide)
- Practical exercise: group audit of a fictitious tenant's configuration to identify risks and propose corrective actions

Case study - Audit and enhancement of an existing platform

- Identify at least five weak points in a proposed scenario
- Propose concrete improvements for each point (e.g. creation of dashboards in Insights, deployment of policies via Automation Ops, integration a credentials safe).
- Prioritize actions to be implemented

Technical documentation - PDD, SDD and structuring of deliverables

- RPA project lifecycle and presentation of deliverables: PDD, SDD, test plan, user documentation, etc.
- Detailed PDD content (process description, business rules, business exceptions)
- Detailed SDS content (technical architecture, flow diagrams, error management)
- Best practices in document structuring (versioning, centralized storage, use of templates)
- Present an example of a PDD and SDD model in project (template projection)
- Show a typical document repository tree for an RPA project

Architecture and best practices - REFramework, modularity, error handling

- Overview of REFramework and its states (Initialization, Get Transaction Data, Process Transaction, End Process)
- Examples of modularization: dividing workflows into reusable sub-processes
- Best development practices: variable management, comments, configuration outsourcing. Error handling strategies and differentiation between business and system exceptions
- Open a project created from REFramework in UiPath Studio and explain the structure of the REFramework.
  project
- Show an example of modular workflow and exception handling with a try-catch block
- Explain how logs are generated and viewed in Orchestrator

Go-live, release management and business continuity

- Deployment process: development environment through rigorous testing to production
- Publication and management of packages in Orchestrator, version tracking
- Examples of continuity plans (use of redundant robots, triggers, resumption of activity in the event of an incident)
- Publish a development package and show promotion towards a
  production in Orchestrator
- Illustrate the rollback process by selecting an earlier version of a process
- Introduce the Triggers screen and explain continuity management

Final exercise - Designing an administration strategy and validating

technical deliverables

- Administration and governance strategy :
  - Define the architecture of environment (number of tenants, organization of files, distribution of licenses)
  - Establish user and role management (rights, security policies, MFA)
  - Describe supervision (Insights dashboards, alerts) and governance (Automation Ops policies)
  - Describe security measures (credential management, safe integration)
  - Set up the production release cycle (testing, validation, deployment, version management)
- Audit of the pilot project :
  - Analyze the documentation (PDD/SDD) supplied and identify any gaps or non-conformities.
  - Check Orchestrator configuration (assets, robots, logs).
  - Suggest improvements and prioritize actions to be implemented.
- Restitution :
  - Oral presentation of audit strategy and recommendations.
  - Discussion and collective feedback led by the trainer.

Companies concerned

This course is aimed at both individuals and companies, large or small, wishing to train their teams in a new advanced computer technology, or to acquire specific business knowledge or modern methods.

Positioning on entry to training

Positioning at the start of training complies with Qualiopi quality criteria. As soon as registration is finalized, the learner receives a self-assessment questionnaire which enables us to assess his or her estimated level of proficiency in different types of technology, as well as his or her expectations and personal objectives for the training to come, within the limits imposed by the selected format. This questionnaire also enables us to anticipate any connection or security difficulties within the company (intra-company or virtual classroom) which could be problematic for the follow-up and smooth running of the training session.

Teaching methods

Practical course: 60% Practical, 40% Theory. Training material distributed in digital format to all participants.

Organization

The course alternates theoretical input from the trainer, supported by examples, brainstorming sessions and group work.

Validation

At the end of the session, a multiple-choice questionnaire verifies the correct acquisition of skills.

Sanction

A certificate will be issued to each trainee who completes the course.