

# UiPath – Use of Artificial Intelligence and Machine Learning

May 2021

In accordance with the Request for Information and Comment on Financial  
Institutions' Use of Artificial Intelligence, including Machine Learning

Docket ID OCC-2020-0049



# Contents

<b>1. EXECUTIVE SUMMARY .....</b>	<b>3</b>
1.1 Strengths of Our Proposal .....	<b>Error! Bookmark not defined.</b>
1.2 UiPath Company Overview .....	4
1.3 A view on Artificial Intelligence and Machine Learning .....	5
<b>2. REQUEST FOR COMMENT .....</b>	<b>6</b>
<b>3. PRODUCT PORTFOLIO .....</b>	<b>10</b>
<b>4. APPENDIX .....</b>	<b>31</b>
4.1 Security and Compliance .....	31
4.2 High-Level Architecture .....	32
4.3 The UiPath Ecosystem .....	33

# 1. Executive Summary

The Board of Governors of the Federal Reserve System, Bureau of Consumer Financial Protection, Federal Deposit Insurance Corporation, National Credit Union Administration, and Office of the Comptroller of the Currency further referred as “Agencies” are gathering information and comments on financial institutions’ use of artificial intelligence (AI), including machine learning (ML).

UiPath is pleased to present our capabilities in this space, in order to enable the Agencies on the AI & ML journey. We would like to highlight the unique features of UiPath that will help you in making the decision to choose the right provider with the right technology.

UiPath is the leading Robotic Process Automation vendor providing a complete software platform to help organizations automate business processes efficiently. We strive to ensure that the platform capabilities we deliver, and support are at the forefront of current thinking and technical capabilities.

Our products deliver enterprise-wide automation benefits, residing with an open, extensible architecture designed for truly smart, highly scalable automation. Our solution contains a workflow designer, called **UiPath Studio**, the **Robots** components (**attended** and **unattended** automation) and our Server, called **UiPath Orchestrator**. The UiPath Orchestrator manages robots specifically developed for customer front and back office processes.

UiPath is the only service provider in the international marketplace today who can offer Robotic Process Automation (RPA) as well as process discovery, Artificial Intelligence, Machine Learning on to one hyperautomation platform.

We are honored to have been chosen by many leading independent industry analysts as the leading intelligent RPA and artificial intelligence (AI) technology enterprise platforms.

- For the third consecutive year, UiPath has been named a ‘**Leader**’ and ‘**Star Performer**’ in the **Everest Group’s RPA PEAK Matrix™**, an accomplishment unique only to UiPath (Additional information is available [here](#)).
- For two consecutive years, **Gartner rated UiPath as a ‘Leader’ in its Magic Quadrant for Robotic Process Automation**. In the latest report, Gartner recognized the capabilities of UiPath based on our *Ability to Execute* (Additional information is available [here](#)).
- UiPath also currently holds Gartner’s ‘**Customer Choice**’ award for July 2019 with the highest volume and score of customer reviews.
- UiPath has been recognized as a Leader in **The Forrester Wave™: Robotic Process Automation**, Q4 2019, achieving the highest possible scores in the Strategy and Market Presence categories, and the highest position of all evaluated vendors in the Current Offering category. Additional information is available [here](#).
- UiPath has also been ranked the leading RPA Vendor by **IT Central Station**, who carries out independent buyer reviews from organizations using RPA tools and provides independent advice and feedback on all RPA vendors. More information is available [here](#).
- UiPath has also been recognized as a ‘Leader’ in **Everest Group's first-ever PEAK Matrix® for Process Mining Technology Vendors**. Additional information is available [here](#).
- Recently, **UiPath has been named to the CNBC Disruptor 50**, an annual list of forward-thinking and ambitious private companies in a range of industries, whose innovations are changing the world. Additional information is available [here](#)

Today, the UiPath solution is proven to deliver 40% faster automation design and deployment as compared to other RPA solutions and is used by more than 7,000 organizations worldwide, including eight of the Top 10 Fortune 500 and **more than 350 government institutions** around the world. Within the U.S. Federal government over 90 federal agencies are leveraging our platform. UiPath is leading the ‘automation first’ era with a vision to provide one robot for every person and is growing at an unprecedented rate for an enterprise software company.

UiPath’s objective is to ensure that our customers accrue the maximum benefits and value from investing in our RPA platform in the most cost effective and risk-free manner.

# 1.1 UiPath Company Overview

UiPath is a public company (NYSE) founded by UiPath’s CEO Daniel Dines and Marius Tirca, its CTO, in 2005. UiPath is the leading automation vendor and has seen an expansion nothing less than extraordinary in the past years, becoming the fastest growing enterprise software company in the history.

- **2005: OUR BEGINNING:** We started building the first automation libraries and share them with developers worldwide. Ended up receiving very positive feedback throughout the years.
- **2013: OUR FIRST UI AUTOMATION PRODUCT:** Deskover as a company is born in Bucharest Romania our main delivery and product development location to date, launching the first UiPath Desktop Automation product line based on Microsoft Workflow Designer, specifically targeting Robotic Process Automation market. First RPA journey initiates with Sutherland and Dell to automate business processes.
- **2015: DESKOVER BECOMES UIPATH.** Our first partnerships with global BPO & Consulting firms.
- **2016: SERVER and GROWTH:** Launch of the Attended and Unattended suites under the new Server 2.0 Architecture. The company is growing, teams scaling up and new locations are opening in India, UK, USA, Japan, Singapore, Philippines.
- **2017:** Recognition as a LEADING RPA VENDOR, 350+ clients, 3000+ robots in production. Launch of NLP integration with Google, Microsoft, IBM, multitenancy support and high-density robot solution. Expansion to Germany & France.
- **2018: CONTINUED ACCELERATED GROWTH,** 2700+ clients, 500+ partners. We have implemented Intelligent OCR semi-structured, Validation with human-in-the-loop, Dynamic workload allocation and Embedded Python scripts and functions. We have been recognized by industry experts as Leaders in the RPA field. Expansion to UAE, South Korea, Spain, Netherlands.
- **2019: ‘AUTOMATION FIRST’ Mindset Era / 5000+ Customers / 700+ implementation partners / 3000+ Employees / 100,000+ Trained Developers / 300,000+ Community Users.** UiPath acquired StepShot and ProcessGold to accelerate customers’ automation journeys by enabling them to quickly and easily record, document, and share processes as well as automate key steps in robot creation and deliver unparalleled End-to-End Process Understanding Solution, respectively.
- **2020:** The UiPath Platform - “AN END-TO-END HYPERAUTOMATION SUITE” / Discover-Build-Manage-Run-Engage-Measure / More than 6000 customers
- **2021:** The Fully Automated Enterprise – AI-powered capabilities, Engaging experiences, 7000+ customers

Our Beginning	First Robotic Automation	The Tipping Point	Server & Growth	Leading RPA Vendor	Accelerated Growth	Automation First	E2E Hyper-automation suite	The Fully-Automated Enterprise
First automation libraries for developers worldwide	Deskover as a company is born in Bucharest, our main delivery and prod. development location to date  Desktop Automation product for Enterprise RPA	Deskover becomes UiPath  Enterprise RPA Partnerships with global BPO & Consulting Firms	Server 2.0 Architecture  Global offices, new locations opening in India, UK, USA, Japan, Singapore, Philippines  100 people  100+ enterprise customers	Expansion to Germany and France  Launched Academy  Series A  700 Customers  550 People  100,000 Community	2,700+ Customers  500+ partners  250,000 Community  \$200 Million Rev  31 Offices  18 Countries	“Automation First” mindset era  5000+ Customers  3000+ employees  100,000+ trained developers  300,000+ Community Users	Additional capabilities  Planning, Process Discovery, Analytics and insights  A full E2E Automation Suite  Discover-Build-Manage-Run-Engage-Measure	AI-powered discovery  AI-powered vision to automate anything that people see  Engaging experiences from natural language to rich interactive applications  Developer experiences
2005	2013	2015	2016	2017	2018	2019	2020	2021

## 1.2 A view on Artificial Intelligence and Machine Learning

We understand that the Agencies are looking for points of view on the use of AI by financial institutions in their provision of services to customers and for other business or operational purposes. Also, a view on the appropriate governance, risk management, and controls over AI and any challenges in adopting, and managing AI.

Artificial intelligence (AI) is a strategic technology that offers many benefits for citizens and the economy. It will change our lives by improving healthcare (e.g. making diagnosis more precise, enabling better prevention of diseases), increasing the efficiency of farming, contributing to climate change mitigation and adaptation, improving the efficiency of production systems through predictive maintenance, increasing the security of citizens and the protection of workers, and in many other ways that we can only begin to imagine.

At the same time, AI entails a number of potential risks, such as risks to safety, gender-based or other kinds of discrimination, opaque decision-making, or intrusion in our private lives. Achieving ethical, trustworthy, and effective AI requires that ethics be grounded in a scientific understanding of the relative strengths and weaknesses of both machine intelligence and human understanding. Considering ways to promote safe and reliable AI requires understanding why AI technologies succeed in some contexts, but fail in others, and ensuring proper oversight, governance and adherence to ethical policies and principles. UiPath and our partners apply fundamental principles to specific problems which requires evaluating tradeoffs between alternatives whose importance vary across organizations, individuals, and populations. We help customers establish an understanding of key considerations and align ethical frameworks to apply given the context in which AI is being deployed.

We strongly believe that digital technologies and AI will become critical factors, not only in determining competitiveness on the global markets, but also in becoming significant drivers of the recovery from the current health and economic crisis caused by COVID-19.

UiPath integrates AI and ML capabilities. Process automation sets the stage for future digital transformation efforts by offering a seamless way to integrate new technologies, such as artificial intelligence (AI) and machine learning (ML) models into workflows. We are fully supportive of the need to develop and deploy AI systems that are compliant with applicable laws, are ethical, technically and socially robust, that ensure the trust of citizens and enable a wide-spread integration of AI into the society and economy. At the same time, leveraging digital technologies and AI to support economic growth and human wellbeing has never been a higher priority.

In this context, it is essential to take a gradual, proportionate, and risk-based approach to regulate AI. Any regulatory attempt should carefully balance potential harms posed by AI with the social and economic benefits created by such technologies. Future regulations should also take note of the nascent nature of AI technologies and its evolving nature. This approach would avoid creating unnecessary barriers and encourage innovation.

We believe that having a harmonized approach to AI is of the utmost imperative to ensure regulatory consistency across countries. Uneven legal frameworks can create barriers to the development, scaling, and competitiveness of companies. Such barriers would harm the overarching objective of government institutions, to form a strong digital market that provides a boost in citizen experiences, improves citizen communication with the government and helps reduce public safety risks, while ensuring clear values, ethics, and law, and in accordance with human rights obligations.

## 2. Request for Comment

### Explainability

**Question 1:** How do financial institutions identify and manage risks relating to AI explainability? What barriers or challenges for explainability exist for developing, adopting, and managing AI?

**UiPath view:** As AI is embedded into almost every single tool we use in modern society— from business applications to personal handheld devices— overregulation could significantly impact the benefits offered by AI. To mitigate the potential risks posed by AI without hindering innovation and progress, any attempt to regulate AI needs to be gradual, proportionate, and flexible. This defines the need of having a clear and concise definition of AI. A broad definition of AI may lead to considering numerous technologies as AI, which creates uncertainty. To avoid over-regulation, the EU should propose a narrow definition of AI systems.

Defining “high-risk AI” is the crucial next step to ensure the proportionality of any envisaged legal framework. We propose the following key aspects to be considered when defining “high-risk” AI:

- focusing on quantifiable and predictable risks
- assessing the probability and severity of the outcome, depending on the use case of the AI application, rather than a sector
- prioritizing the prevention of risks for safety and fundamental rights, e.g., physical harm and/or a breach of individuals’ fundamental rights

However, AI systems are often industry agnostic. The same AI application can pose low risks in one use case, and higher risk if it is deployed in a different environment. For such AI applications, we need to assess the risks following a case by case basis analysis and take industry-specific mitigation techniques. For an accurate and relevant assessment, a real-time risk calculator and risk grading/stratification system should be developed in collaboration with experts. A static definition of “high-risk AI” is therefore not appropriate.

**Question 2:** How do financial institutions use post-hoc methods to assist in evaluating conceptual soundness? How common are these methods? Are there limitations of these methods (whether to explain an AI approach's overall operation or to explain a specific prediction or categorization)? If so, please provide details on such limitations.

**UiPath view:** Finance and Banking institutions embrace RPA to speed up compliance, reduce costs, and increase operational efficiency.

Banking and capital market leaders face a myriad of challenges: changing customer behavior and expectations, tightening regulations and controls, declining business health, and evolving workforce dynamics. These competitive pressures often led to early adoption of Robotic Process Automation (RPA) and AI.

<https://www.uipath.com/resources/automation-case-studies/eurobank>

<https://www.uipath.com/solutions/industry/banking-automation>

**Question 3:** For which uses of AI is lack of explainability more of a challenge? Please describe those challenges in detail. How do financial institutions account for and manage the varied challenges and risks posed by different uses?

Lack of explainability is a challenge for the AI use cases that involve customer experience and regulatory impact. For example, during the underwriting process, when AI is used for risk assessment and pricing (premium), any extra financial burden to the customers - (Banks) that can cause lower margin also impacting deposit yield for end-customers (depositors) and lack of transparency during the regulatory filing can cause challenges. Also, lack of explainability causes additional administrative burdens as employees such as underwriters would be averse to take responsibility decisions based on the AI risk ratings if the

explanation is not provided for the basis of assessment and the potential adverse impact it might have during any litigation. Financial Services Enterprises are managing the challenges and risks of explainability by:

- Documenting the design and architecture of the algorithms, workflow, exceptions and decision outcomes, continuously updating the documentation from the learnings.
- Creating a standard operating procedure and check points for transparency during the training of the AI models and continuously validating the outcomes for deviations, that can lead to the above customer and regulatory risks and taking immediate corrective actions.
- Deploying clear governance model and infrastructure for logging and auditing of the entire data pipeline – from aggregation, validation, decision generation to the final action – for continuous monitoring, validation and improvement of both data and the AI models.

### **Risks From Broader or More Intensive Data Processing and Usage**

**Question 4:** How do financial institutions using AI manage risks related to data quality and data processing? How, if at all, have control processes or automated data quality routines changed to address the data quality needs of AI? How does risk management for alternative data compare to that of traditional data? Are there any barriers or challenges that data quality and data processing pose for developing, adopting, and managing AI? If so, please provide details on those barriers or challenges.

UiPath view: UiPath works closely with our customers and partners during engagements to conduct quality control and peer review of automations that can access any number of different applications, data, or AI engines. The steps and approaches vary from engagement to engagement, but UiPath follows a mature project methodology with quality control and quality assurance built in to ensure the expected phase results are accurate.

In addition, when data is involved, getting data right is always important as poor data quality issues introduce bias and can affect the outcome of the intended results. UiPath has expert resources who conduct peer reviews of processes, code, documentation and models or algorithms. Most importantly, we work with our clients to ensure that the final deliverable(s) are achieving the desired outcome.

**Question 5:** Are there specific uses of AI for which alternative data are particularly effective?

Alternative data / Big data are effective for the AI uses cases such as Anti Money Laundering, portfolio risk assessment and monitoring, economic cycle prediction using sentiment analysis, geo-political risk assessment using satellite data, to name a few. The Alternate Data / Big data used for the use cases include transaction analysis (Eg. Credit / Debit card data), web data (scrapping), Geolocation, Satellite, App / Web traffic & usage analysis.

### **Overfitting**

**Question 6:** How do financial institutions manage AI risks relating to overfitting? What barriers or challenges, if any, does overfitting pose for developing, adopting, and managing AI? How do financial institutions develop their AI so that it will adapt to new and potentially different populations (outside of the test and training data)?

TBD

### **Cybersecurity Risk**

**Question 7:** Have financial institutions identified particular cybersecurity risks or experienced such incidents with respect to AI? If so, what practices are financial institutions using to manage cybersecurity risks related to AI? Please describe any barriers or challenges to the use of AI associated with cybersecurity risks. Are there specific information security or cybersecurity controls that can be applied to AI?

UiPath view: Customers' IT organizations are under tremendous pressure to work more efficiently, decrease operating costs, drive innovation and contribute more to defining and executing overarching company strategies.

Companies need to empower their IT departments to focus more time on strategic projects that deliver tangible value, rather than overwhelm knowledge workers with frequent time-consuming tasks that fail to make use of their specialized skills or extensive experience. Hyperautomation technology such as Robotic Process Automation (RPA) removes many of the onerous jobs that dominate daily IT work, providing more opportunities to innovate and support the business at a strategic level. Organizations that have already launched RPA programs should consider expanding the reach of those solutions to automate more processes across the enterprise. Embracing hyperautomation and unlocking its full potential will ultimately lower operating costs, improve efficiency and provide IT staff with the time necessary to work on strategic projects that directly impact the bottom line. Hyperautomation technology such as Robotic Process Automation (RPA) removes many of the expensive, onerous jobs that dominate daily IT work.

TBD

### **Dynamic Updating**

*Question 8:* How do financial institutions manage AI risks relating to dynamic updating? Describe any barriers or challenges that may impede the use of AI that involve dynamic updating. How do financial institutions gain an understanding of whether AI approaches producing different outputs over time based on the same inputs are operating as intended?

TBD

### **AI Use by Community Institutions**

*Question 9:* Do community institutions face particular challenges in developing, adopting, and using AI? If so, please provide detail about such challenges. What practices are employed to address those impediments or challenges?

TBD

### **Oversight of Third Parties**

*Question 10:* Please describe any particular challenges or impediments financial institutions face in using AI developed or provided by third parties and a description of how financial institutions manage the associated risks. Please provide detail on any challenges or impediments. How do those challenges or impediments vary by financial institution size and complexity?

TBD

### **Fair Lending**

*Question 11:* What techniques are available to facilitate or evaluate the compliance of AI-based credit determination approaches with fair lending laws or mitigate risks of non-compliance? Please explain these techniques and their objectives, limitations of those techniques, and how those techniques relate to fair lending legal requirements.

UiPath view: Please refer: <https://www.uipath.com/solutions/industry/banking-automation>

*Question 12:* What are the risks that AI can be biased and/or result in discrimination on prohibited bases? Are there effective ways to reduce risk of discrimination, whether during development, validation, revision, and/or use? What are some of the barriers to or limitations of those methods?

UiPath view: Data is what drives AI. Algorithms are trained through a set of data that is used to inform or build the algorithm. If the algorithm is identifying a car as a bicycle, ample amounts of data about cars and bicycles are needed to properly train the algorithm. Likewise, if the algorithm is identifying animals as humans, we need to provide more data about a diverse set of humans for the algorithm to adequately discern one from others. If the algorithm is making inaccurate or unethical decisions, it could be there was insufficient data to train the model, or that learning reinforcement was not adequate for the desired result and/or proper oversight may have been lacking. It is also possible that humans have injected their bias, values or perceptions into the system via a biased data selection approach or badly assigned reinforcement values. Overall, we must make sure the data and inputs we provide are painting a complete and correct picture for the algorithms, so they are free of bias.



UiPath has proven to help organizations around the globe access and create trusted data. Robots enable data from any system (internal or external) to be easily accessed and prepared without human effort, giving organizations the ability to rapidly curate vast amounts of rich information for various AI applications. To bring ethics to the data phase of AI takes a combination of technology and people to manage data and in order for the business to achieve consistency and transparency for the long term. One does not preclude the other and they must be applied with an ethical approach to data and decisions.

**Question 13:** To what extent do model risk management principles and practices aid or inhibit evaluations of AI-based credit determination approaches for compliance with fair lending laws?

TBD

**Question 14:** As part of their compliance management systems, financial institutions may conduct fair lending risk assessments by using models designed to evaluate fair lending risks (“fair lending risk assessment models”). What challenges, if any, do financial institutions face when applying internal model risk management principles and practices to the development, validation, or use of fair lending risk assessment models based on AI?

TBD

**Question 15:** The Equal Credit Opportunity Act (ECOA), which is implemented by Regulation B, requires creditors to notify an applicant of the principal reasons for taking adverse action for credit or to provide an applicant a disclosure of the right to request those reasons. What approaches can be used to identify the reasons for taking adverse action on a credit application, when AI is employed? Does Regulation B provide sufficient clarity for the statement of reasons for adverse action when AI is used? If not, please describe in detail any opportunities for clarity.

TBD

### **Additional Considerations**

**Question 16:** To the extent not already discussed, please identify any additional uses of AI by financial institutions and any risk management challenges or other factors that may impede adoption and use of AI.

UiPath view: Please see <https://www.uipath.com/solutions/industry/banking-automation>

**Question 17:** To the extent not already discussed, please identify any benefits or risks to financial institutions' customers or prospective customers from the use of AI by those financial institutions. Please provide any suggestions on how to maximize benefits or address any identified risks.

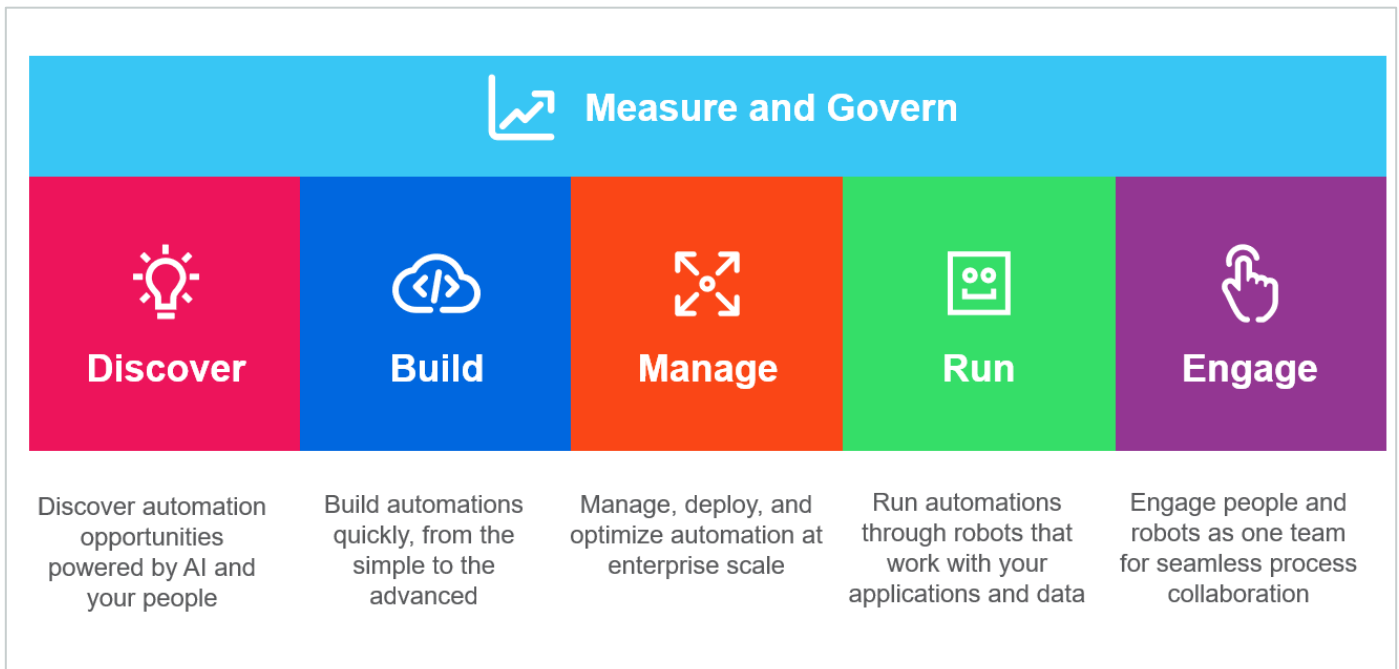
UiPath view: Please see <https://www.uipath.com/solutions/industry/banking-automation>

### 3. Product Portfolio

UiPath’s products deliver enterprise-wide automation benefits, residing with an open, extensible architecture designed for truly smart, highly scalable automation. UiPath aims to assist our customers in their entire automation journey by offering a platform that represents **a full end-to-end automation suite**. Whereas our core products are the Studio, Orchestrator and Robots, our additional strengths lie in the planning and process discovery stages before process build as well as in the analytics reporting of business metrics and insights.

Expedite automation time-to-value and ongoing ROI with hyperautomation across the entire lifecycle. The UiPath Hyperautomation platform systematically drives business value by enabling organizations to:

- Discover and manage every automation opportunity, with full transparency and control
- Enable automation enterprise-wide, by empowering everyone to automate
- Automate more (and more advanced processes), with drag-and-drop AI
- Demonstrate the value and the ROI of your automations



# Discover Automation Opportunities Powered By AI And Your People

## Process Mining

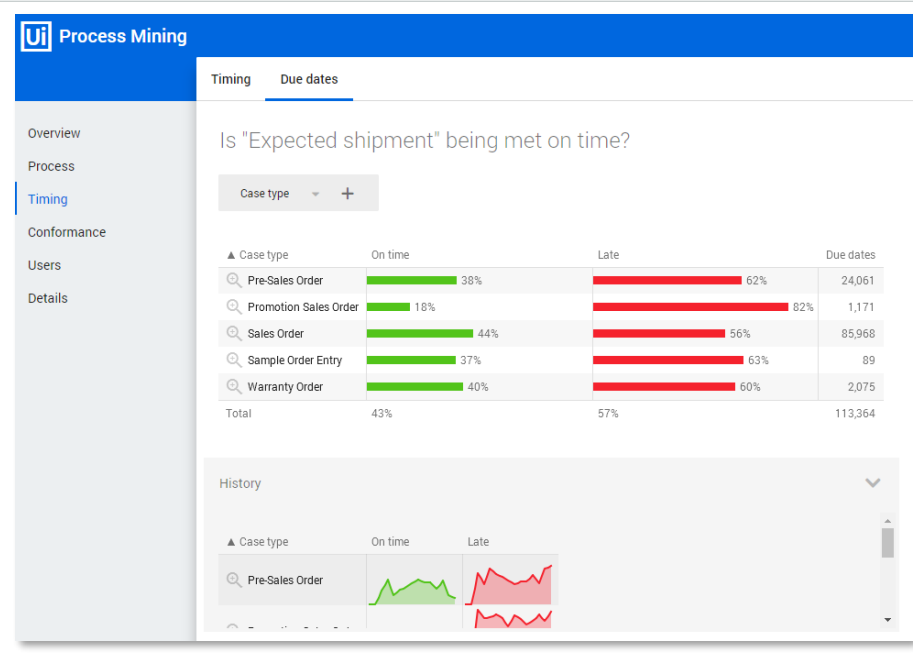
**UiPath Process Mining** reconstructs the digital footprints left behind in your enterprise systems and applications, turning them into intuitive process graphs and dashboards that help you discover, automate and monitor your processes. It uses AI to analyze back-end systems and application logs to obtain the back-end perspective of your processes. Back-end system data has its own story to tell about how work really gets done at scale, and where your best automation opportunities are. UiPath Process Mining will help the organization gain insight to optimize end-to-end processes—not just initially, but continuously.

It will access your back-end data from IT systems and will tell the story about how these processes work together, what is their impact and what is the back-end part of tasks your employees do.

Use data from your business applications (like ERP and CRM) to get a thorough understanding of your processes. You will know what to automate and how to do it best—and prove impact afterward

Process Mining helps our customers zoom in on every process to find the most valuable and impactful automation and optimization opportunities:

- **Discover your process:** Process mining captures the digital footprints your processes leave behind in systems like SAP, Oracle and Salesforce. Using a powerful data transformation layer, raw data is turned into visualizations that chronicle your process from start to finish. Using this data driven view of your processes, you can easily spot and analyze bottlenecks, rework and variations that are ripe for automation.
- **Plan and implement automation:** After analysis, you can zero in on what should be automated first, how to do it and what the return of your efforts will be.
- **Continuously monitor the impact automation has on processes:** Process mining adds valuable context to your automation strategy. Once you have automated an activity, you can check in on how it's impacted the rest of the processes. You can also infuse business logic into your processes, ensuring your processes and automation align with top-level KPIs.
- **Act quickly to resolve unwanted process behavior:** Trigger your robots or alert your people whenever your processes go of track. Acting quickly on unwanted process behavior means that you can keep your processes, and therefore your business predictable and less vulnerable to external disruptions.



- Understand what the **systems** are doing
- Identify all the time-consuming or non-value-added activities
- Understand the complexity, timing and impact of each process
- Find bottlenecks in your workflows
- Integration with UiPath Action Center and UiPath Robot
- SAP Extraction
- SAP Connector for O2C

## Task Capture

**UiPath Task Capture** is a Process Understanding tool that assembles step-by-step workflows into easily-digestible documentation. The tool collects deeper insights about the processes, directly from SME's. It works side by side with your employees to get the deepest insights about the company's processes and transforms expert knowledge into organizational insights.


- Document: Automatically capture every single detail of the process, including number of steps and execution time
- Enhance: Clarify process steps with a comprehensive editing toolset
- Develop Faster: Use detailed RPA documentation to fuel the digital transformation.

The tool allows employees to quickly document the process they are experienced in without any intervention in their traditional workflow. Then they can easily edit it and add text explanations, providing useful remarks to each step. Thanks to the one-click export into common RPA documents (PDD, XAML file or Workflow diagram). Task Capture successfully bridges the gap between your employee and the RPA experts.

UiPath Task Capture helps delivering useful insights about automation ideas directly from people who have the biggest knowledge and are closest to the process.


Task Capture comes with deep integration with Automation Hub and Test Manager for PDD (Process Design Document) storage.

Start creating a process with:



Record your work to automatically create a process flow

Capture Process



Create business steps first and then fill them with the actions.

High Level Diagram

- **Captures in-depth process details** by generating screenshots, step-by-step descriptions and detailed annotations
- **Delivers automation ideas directly from the people who are closest to the process**
- Bridges the gap between the process experts and RPA developers with one-click export to PDD or XAML
- Integration with Automation Hub

## Automation Hub

**Automation Hub** is an open, transparent and collaborative platform and reusable component repository that accelerates the adoption of RPA across an organization. It enables process identification, automation pipeline management, process documentation and offers an automation reusable components repository. UiPath Automation Hub builds an RPA Community of Interest which puts the employees in the driver seats of automation initiatives.

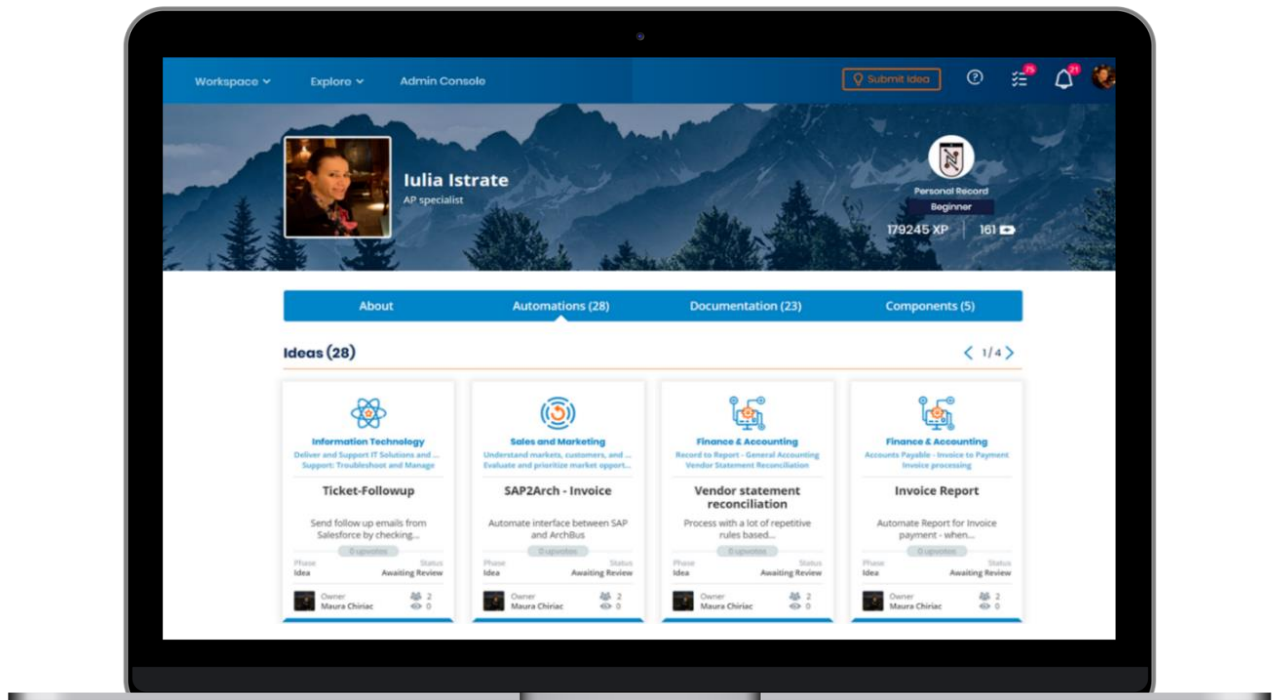
Work with all the right people in the organization, including IT and your business partners, to drive automation opportunities that make a real difference to your organization. Capture automation ideas from those who know the work best – the employees themselves.

Automation Hub offers the organization a powerful tool to manage the automation pipeline, expediting the progress from discovery to buildout. A few notable features: Opportunity Identifier & Pipeline Manager, ROI Calculator, Documentation Repository, Component Gallery, Enterprise Community, Performance Dashboards.

Automation Hub fosters an open, transparent and collaborative automation community and enables:

- Global RPA adoption across the organization
- Consistent, controlled and data-driven selection process for RPA candidates
- Centralized automation pipeline management
- Instant visibility and control over the automation program
- Best practices and implementation consistency
- Centralized repository of all automation-related process documentation, deliverables and code

The Automation Hub capabilities are complemented by Open API and Citizen developer support. Developers can sync tools like Jira and Workday to automation initiatives with the new Open API. Also, Citizen Developers can review automation submissions and host the approved ones.

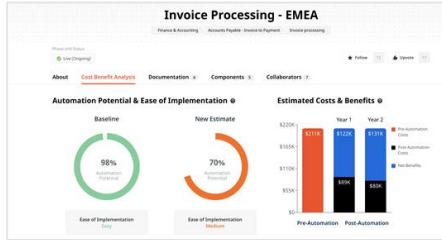


### OPPORTUNITY IDENTIFIER & PIPELINE MANAGER

Automation Pipeline

Automation Name	Priority	Phase	Status	Complexity	Est. Budget	Action
Invoice Processing - EMEA	High	Discovery	On Track	2/2	\$150,700	View
General Res. Activity	Medium	Discovery	On Track	2/2	\$60,000	View
Invoice Matching	Medium	Discovery	On Track	2/2	\$170,000	View
Credit Limit payments control	Medium	Discovery	On Track	2/2	\$160,075	View
Expense reporting policy UK	Medium	Discovery	On Track	2/2	\$100,000	View
Marketing Analysis for P2 and P3	Medium	Discovery	On Track	2/2	\$14,070	View

### ROI CALCULATOR



### DOCUMENTATION REPOSITORY

Invoice Processing - EMEA

Automation Files

- Create New Process Document with Task Capture
- CAPEX Invoice sample
- OPEX Invoice Sample
- AP Procedure

### COMPONENT GALLERY

Explore Components

- Google G Suite
- Command Line Login Bot SAP Solution
- OCR Activity for Microsoft Word AP
- Full Refund Automation for ECC
- Read Extra Large Spreadsheets
- PDF Converter for Microsoft Word Text
- Activities for Microsoft Windows Service Address
- Connector for Sales Force Automation

### ENTERPRISE COMMUNITY

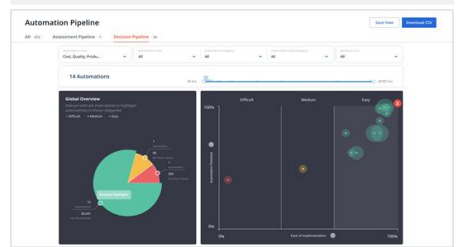
UiPath Enterprise Community

Julia Istrate, AP Specialist

Ideas (48)

- Onboarding of employees
- Submit Travel Expense Report
- Booking accommodation
- Invoice processing

### PERFORMANCE DASHBOARDS



## Build Automations Quickly, From Simple To Complex

With a common foundation and dedicated activities sets for different coding skills, the Studio family of products offers everyone the ability to build their own robot. A Citizen Developer can start off the task automation in StudioX, an experienced RPA developer from the Center of Excellence can enhance it in Studio and distribute to the entire company for deployment in UiPath Assistant.

### UiPath Studio

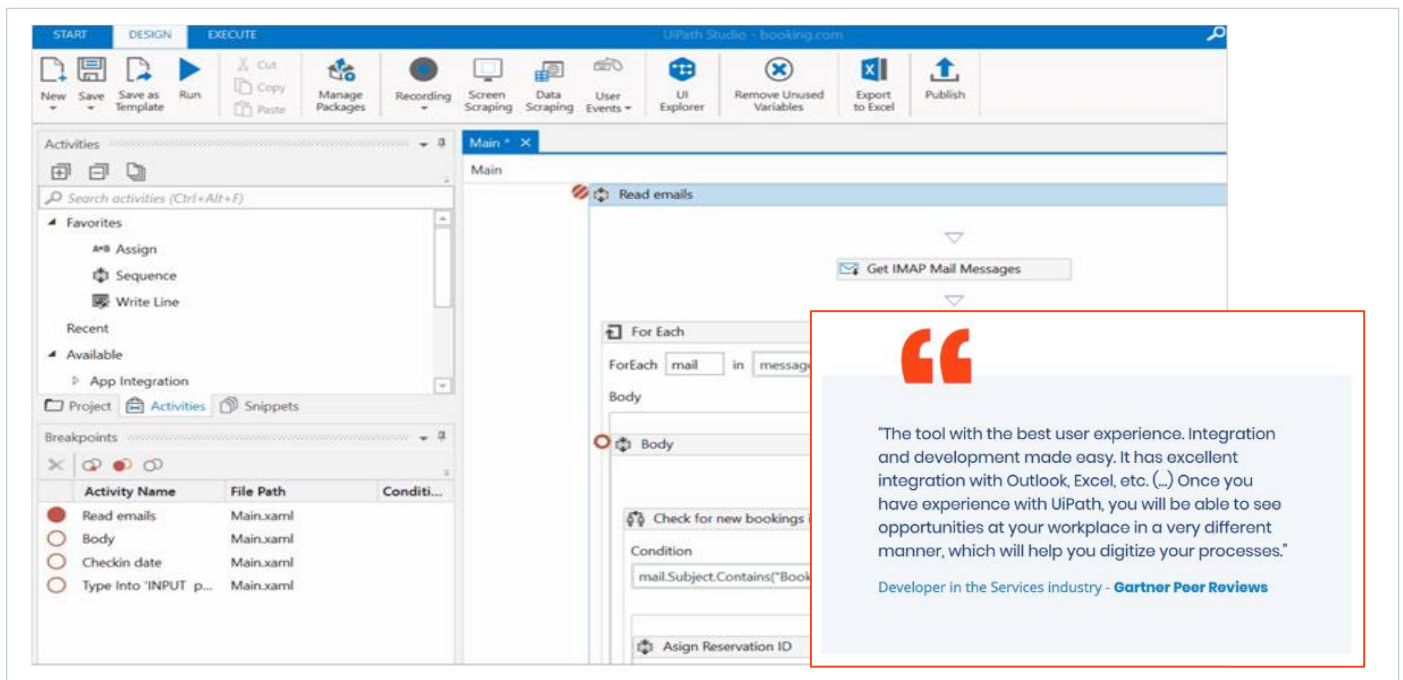
UiPath Studio is an advanced visual process modelling tool that users use effortlessly and without any programming knowledge. Straightforward drag-and-drop functionality and a built-in library of predefined activities greatly enhance the user’s experience and speed up the learning curve. Alternatively, a simple “record” button chronicles the user’s actions on the screen and translates them into logical steps to create application or web-based workflows.

The tool introduces a visual, declarative way for describing how to automate a process, and businesspeople can use it in the same way they use a Visio diagram. When working with the presentation layer of other apps, you simply indicate on the screen what operation you need to perform. UiPath understands the UI at the logical control level and does not rely on the position of elements on screen. This makes automation much more reliable and independent of screen-size and resolution.

UiPath **AI Computer Vision** algorithm enables human-like recognition of user interfaces, using a mix of AI, OCR , text fuzzy-matching, and an anchoring system to tie it all together. This allows our Robots to “see” the screen and visually identify all the elements, rather than relying on their hidden properties, IDs, and other metadata.

Main features:

- Code free
- Logical
- Highly visual
- Focused on usability
- Easy execution of automation workflows
- Easy publishing of automation workflows
- Connectors and Wizards





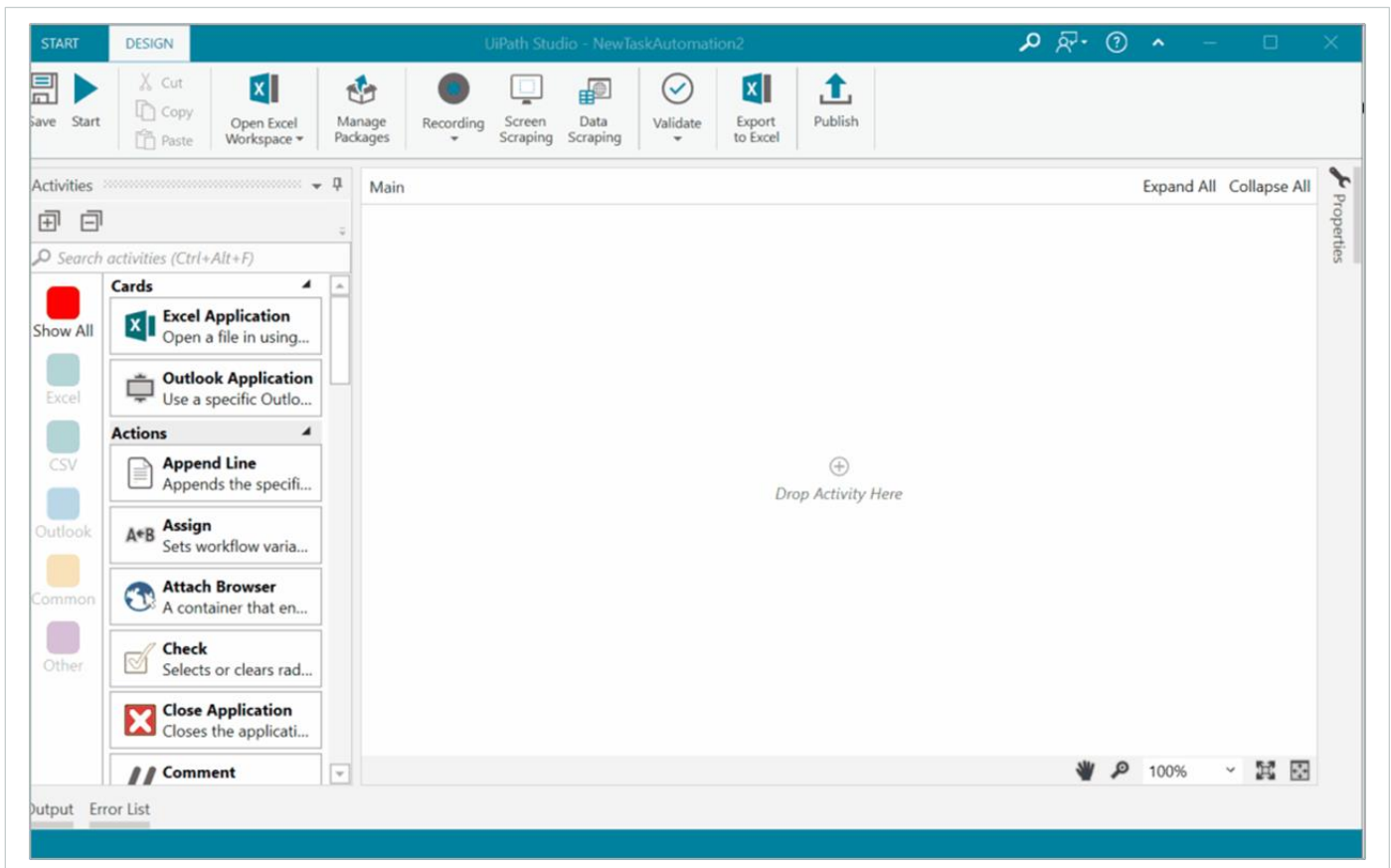
## UiPath StudioX

UiPath StudioX (*Studio for business*). A simplified workflow designer dedicated to business users. It offers straightforward business task automation, seamless Office integration and a simplified interface. Employees chip in as Citizen Developers by automating their own Excel and Outlook tasks in UiPath StudioX.

StudioX features an intuitive digital canvas used for designing automation workflows with prebuilt activities that you can simply drag and drop to the editor - making automation accessible to all. Use the built-in recorder, drag & drop widgets and best practice templates to rapidly automate, without the need for additional developer resources or coding. Once complete, the workflow is seamlessly executed by the UiPath Robots.

UiPath StudioX features:

- Native support for PowerPoint
- Support for Gmail and Exchange
- Dedicated SAP activities
- Support for secure entry of passwords





## UiPath Studio Pro

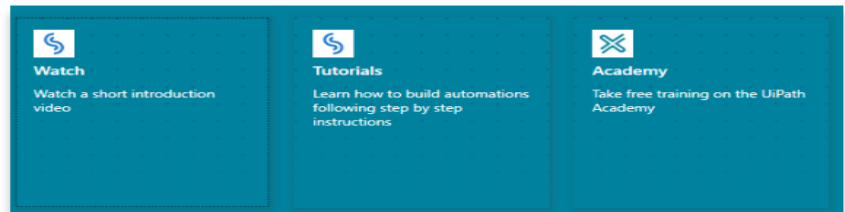
UiPath Studio Pro is a Testing Solution that will benefit from the same production grade RPA which plans to deliver a unique opportunity to share, reuse and update assets across Development, Operations and Business in a seamless manner.

Be it testing software applications or testing existing RPA automations, UiPath Studio Pro answers the needs for scalable, resilient, enterprise-wide automation. A couple of notable features:

- Application testing: specialized test cases for conducting automated application testing
- RPA Testing: testing workflows directly and viewing the activity coverage during execution
- API Test Automation: import Postman collections to use in testing projects

The Studio family of products offers organization level governance, enabling you to adjust the level of control to best suit your company setup and your type of users. Allow your employees the freedom to automate in a controlled environment. Rules can be adjusted to different levels for more experienced Studio users compared to StudioX business users and organizational development standards can be enforced through the Workflow Analyzer.

Find out the right learning path for your needs and skills. UiPath products come with complete documentation, tutorials and demos as well as complete training programs to upgrade your skill level.



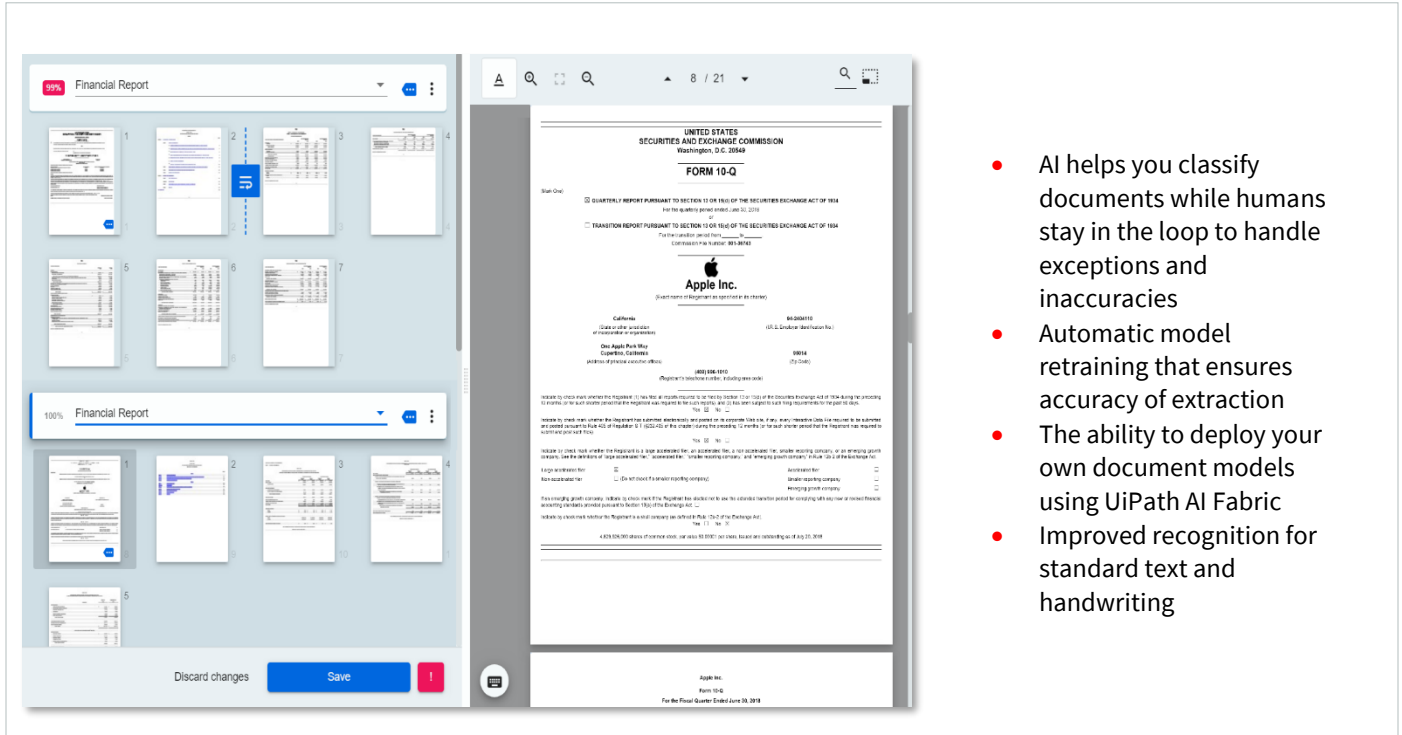
## UiPath Document Understanding

UiPath Document Understanding combines RPA and AI to help you extract and interpret data from different documents and ensure end-to-end document processing. The tool works with a wide range of documents from structured to unstructured, recognizes different objects like tables, handwriting, signatures, and checkboxes, and can deal with various file formats.

Available directly from Studio, UiPath DU provides drag-and-drop elements designed for intelligent document processing. Leveraging a combination of different approaches like templates and ML models, it can ensure most rapid and accurate results even if the critical information has been scanned at an angle and mixed with other unrelated documents. Integrated in the UiPath RPA platform, it can work with any tasks involving documents, thus save a lot of time and money spent on manual document processing.

- **Accurate and fast AI-enhanced data extraction for a wide range of documents:** Combine various data extraction techniques from rules to ML models to ensure rapid and accurate document processing for a wide range of document types and formats. This would help you mitigate the risk of human error and avoid related losses both for you and your customers.
- **Integrate document processing directly into your end-to-end automations:** Seamlessly automate high-volume document processing as part of your end-to-end RPA workflows. Document Understanding is integrated within the UiPath RPA platform to ensure smooth and effective automations.
- **Assist humans in automating complex and cognitive tasks:** Help employees escape from mundane chores and focus on higher-value tasks and business goals. Save time and costs spent on highly manual documentation routine to achieve higher efficiency and better employee experience.

The UiPath Document Understanding Framework contains the **Intelligent OCR activities, Validation Station, and Taxonomy Manager** features as well as dependent Activity packages such as the Document Understanding ML Activities Pack are proprietary technology developed by UiPath with flexibility to digitize, classify, and extract information from a variety of document formats including PDFs, TIFFs, and images (JPG/GIF), and for a range of scenarios ranging including forms, handwritten forms, and high variance documents.



- AI helps you classify documents while humans stay in the loop to handle exceptions and inaccuracies
- Automatic model retraining that ensures accuracy of extraction
- The ability to deploy your own document models using UiPath AI Fabric
- Improved recognition for standard text and handwriting

Document Understanding launches a set of long-anticipated features in the AI area:

- AI can drive document classification and splitting while keeping humans in the loop – they can use Classification Station to handle exceptions or inaccuracies.
- To help robots understand your custom documents even better, you can incorporate automatic model retraining directly into your workflow. The accuracy of the extraction and classification results improves over time as the models get trained based on the data validated by humans. Similarly, you can deploy your own model using UiPath AI Fabric, both on-prem and cloud.
- Equally important are product enhancements for more accurate text recognition – be it printed text or handwriting. We are releasing our own AI-enhanced UiPath Document OCR and improved handwriting recognition within the Intelligent Form Extractor. You can automatically process a wider range of documents with a higher accuracy, thus, with fewer requests for human input



Extract and interpret data from **structured documents** (different forms, passports, licenses, time sheets, etc.) that can contain handwritten text, signatures, checkboxes.



Extract data from **semi-structured documents** containing fixed and variable parts like tables. Samples of semi-structured documents are invoices, receipts, purchase orders, medical bills, bank statements, utility bills, etc.



Analyze and extract data from complex **unstructured documents** like various contracts, agreements, emails, disease descriptions, drug prescriptions, news, voice scripts, etc.



Substitute **human validation** and processing the data from documents by robots that use AI to understand and act upon the extracted content.

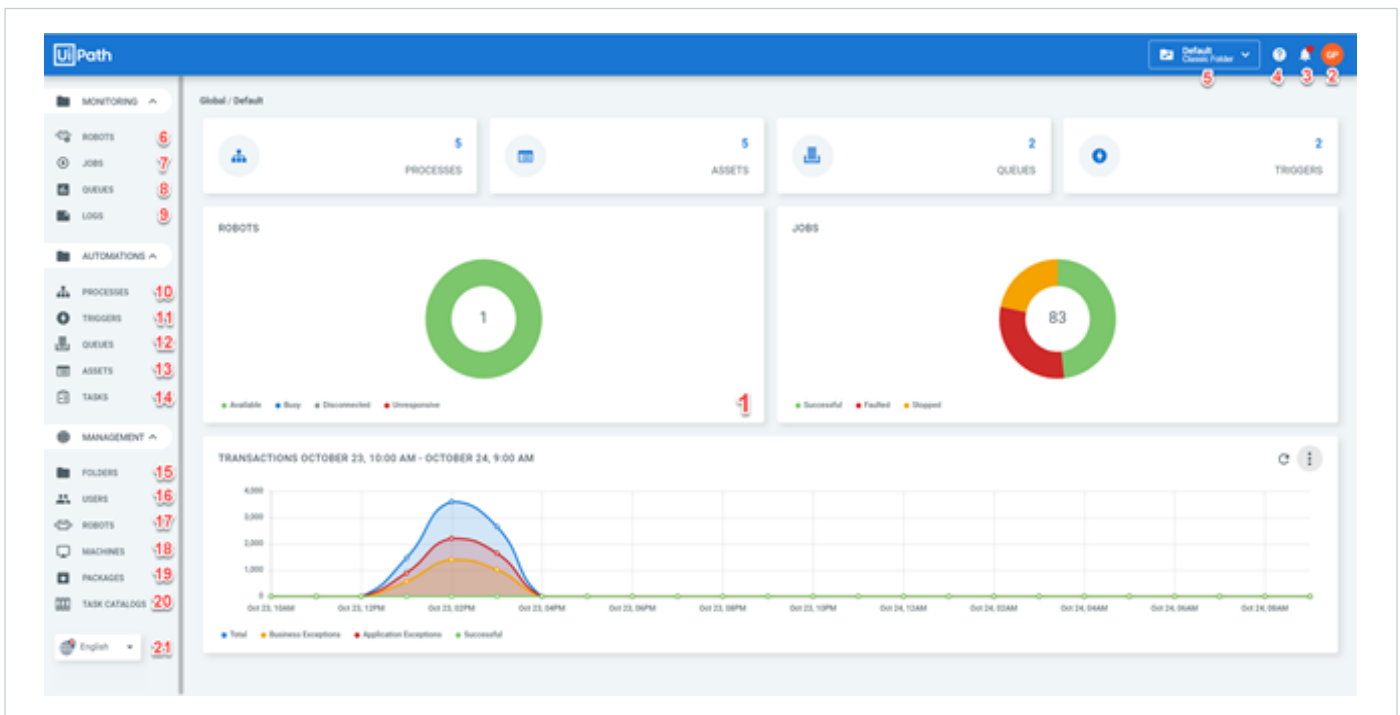
## Manage, deploy, and optimize automation at enterprise scale

### UiPath Orchestrator

Orchestrator is the heart of Enterprise-scale management, optimization, cost-control and compliance for the UiPath Platform. Available in-cloud or on-prem, Orchestrator integrates with the enterprise systems customers already use to simplify and "orchestrate" the entire automation lifecycle with robust role-based access control and monitoring.

UiPath Orchestrator is a browser-based server application that enables you to manage robots and processes. By using the server web console, you can: deploy, start, stop, schedule processes and monitor their execution. UiPath Orchestrator facilitates both human-robot collaboration and business exception handling by using centralized work queues. In front office automation scenarios, the Orchestrator acts as a central repository for processes. It manages version control and aggregates robot logs. It also provides monitoring, reporting, and security capabilities.

From its browser-based dashboard, hundreds of software robots can be deployed and monitored. In unattended automation scenarios, the Orchestrator is an industry standard platform capable of queuing large volumes of transactions. It orchestrates and deploys hundreds of software robots in a synchronized, scheduled fashion to complete the work with remarkable speed. An automation workflow can be deployed from one robot to dozens or even hundreds in a matter of seconds – same applies for down-scaling. This feature allows business users to adjust the robot work effort instantly.



Orchestrator is a single, integrated platform with multiple deployment options.

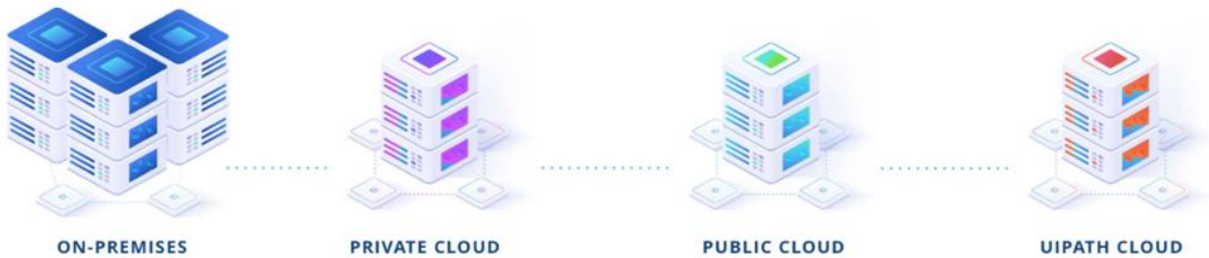
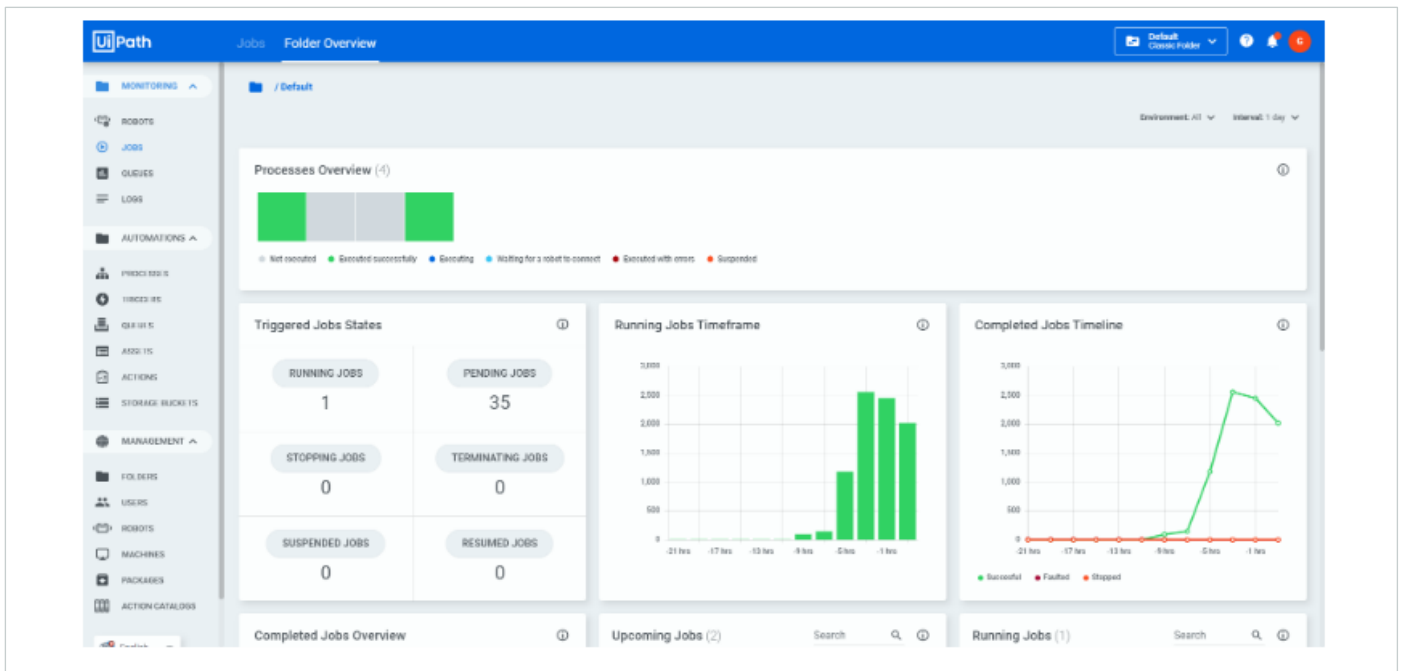
- **On-premises**, the UiPath Orchestrator is fully deployed in your environment
- **On a preferred Cloud** (IaaS and PaaS): Orchestrator can be deployed in a public or private cloud of your choice. UiPath supports Infrastructure-as-a-Service deployment in leading public clouds such as Amazon Web Services (AWS) and Microsoft Azure.
- **On UiPath cloud** (UiPath Automation Cloud): this is a Software-as-a-Service model, where UiPath provides Orchestrator-as-a-Service.

# Automation Cloud

UiPath Automation Cloud is our Enterprise SaaS solution, ready to provision and use immediately, which helps you manage all your automation work and resources in one place. It enables you to deploy, operate, and scale your robotic factory in just a few seconds. Manage your licenses, add multiple Orchestrator services, grant or remove user access rights to any of these instances, and access services to create Robots, environments, machines, processes, run jobs, create schedules - practically do anything you need, all from one centralized, secure location on the cloud.

UiPath Automation Cloud is built on a simple idea: whether you're an enthusiast, an entrepreneur, or an enterprise, you should be able to get the benefits of automation delivered from the cloud – without lots of infrastructure and associated costs, but with the scalability options you want and the security architecture you need.

The UiPath Automation Cloud delivers immediate management of robots, easy endless scalability and high availability, all from a UiPath managed SaaS cloud



## Single Platform, Multiple Deployment Options

- 1 Consistent automation experience
- 2 On-premises, IaaS, PaaS, SaaS and hybrid options
- 3 Multiple public cloud provider options

# AI Fabric

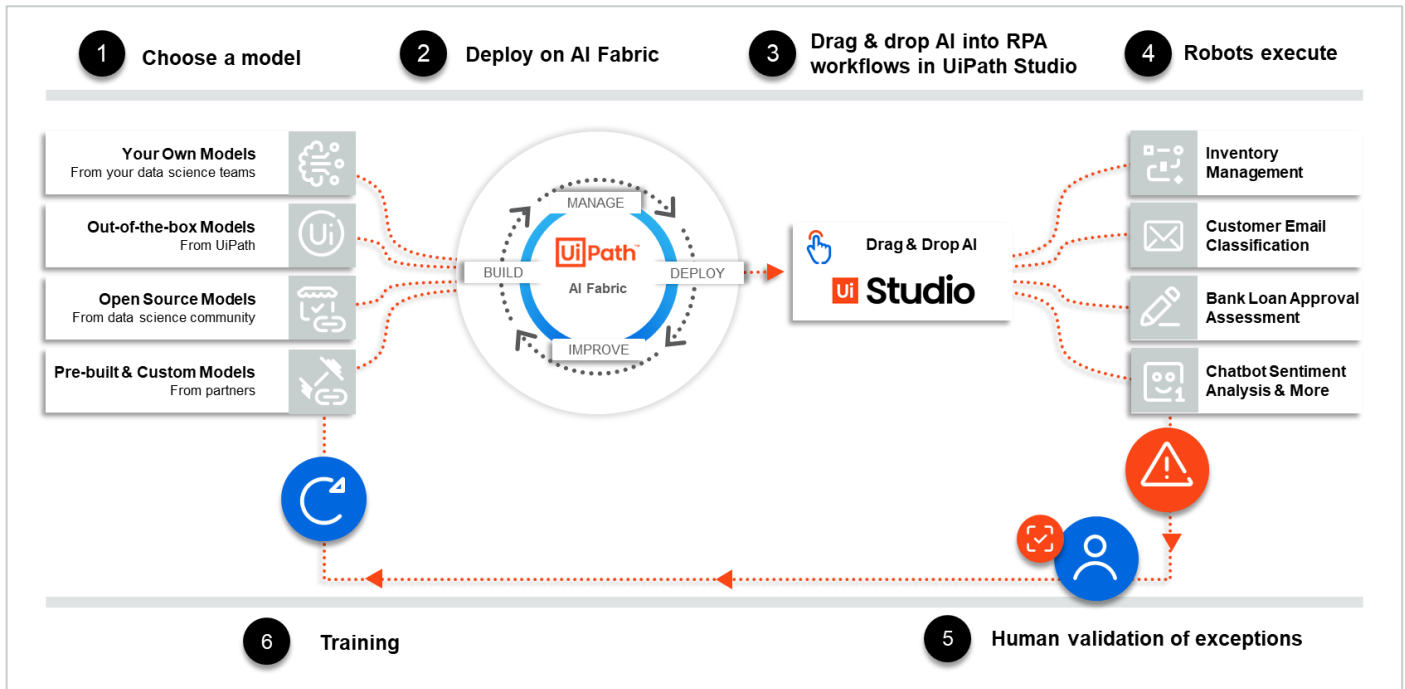
RPA and Artificial Intelligence work better together. When paired, they can read, write, listen and make decisions to work efficiently. UiPath has developed a solution to create RPA, called **AI Fabric** – the connective tissue between RPA and AI, delivering end to end AI skill creation and deployment. AI Fabric **provides an end-to-end Platform to Accelerate AI & Automation Strategy**.

AI Fabric will break down the barriers between RPA and data science teams and enable customers to instantly apply the limitless cognitive power of AI to any software currently being automated by RPA:

- Seamless drag and drop interface will allow you to deploy AI models into an RPA workflow in seconds. Deploy AI as simply as you deploy a UiPath Robot.
- Operationalize AI models developed by UiPath, from over 60 AI technology partners, or use custom models built by your own data science teams.
- Deliver end-to-end visibility of model versioning and updates. Your RPA teams will know when models have been updated, and your data science teams will know how your models are being used in production.
- Analyze model performance and impact with advanced model management and monitoring.
- Close the RPA/AI data feedback loop to enable continuous improvement of AI models over time.

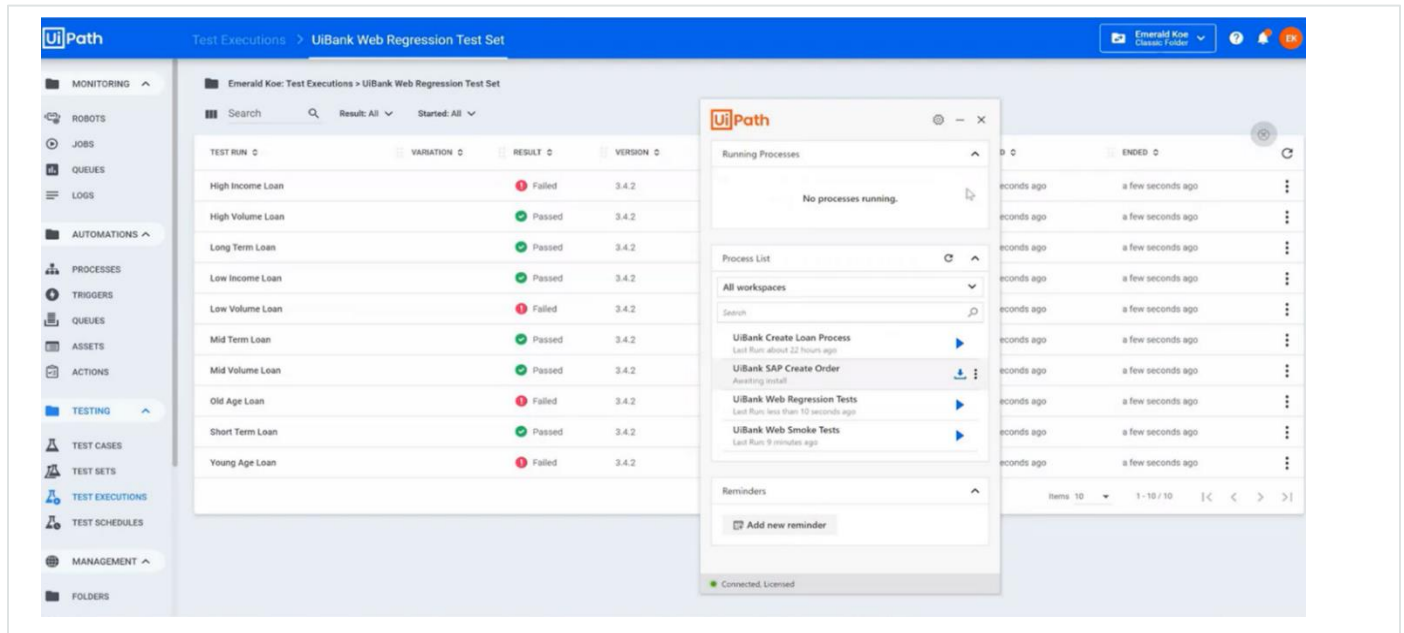
AI Fabric will connect seamlessly with UiPath Studio and Orchestrator to create a unified RPA and AI experience, delivering end-to-end AI/ML skill deployment and management within the UiPath Platform.

- Deploy and manage AI Skills - Make AI endpoints easily accessible to your RPA workflows so that you can scale ML models and other AI Skills to thousands of Robots with the click of a button.
- Version control and update AI Skills - Provide end-to-end visibility across your teams on how AI Skills are being used and when they undergo changes or updates.
- Continuous improvement of AI Skills - Closing the data feedback loop will enable AI Skills to learn and improve
- Leverage Custom AI Skills - Build and implement workflows with your own custom AI models specifically suited to the unique needs of your business.



## Test Manager

UiPath Test Manager is a web-based interface that expedites comprehensive test planning, requirements traceability, and defect reporting along with an orchestration layer which facilitates integration with ALM tools such as Jira (directly or via a Xray plug-in), Azure DevOps, etc. Test Manager is self-sufficient, and it is not mandatory that customers use third-party ALM tools, they can manage everything from the test manager itself.



## Data Service

The UiPath Data Service is a persistent data storage service bringing powerful no-code data modeling and storage capabilities to your Robotic Process Automation (RPA) projects. This central place built to securely store and manage your business data within UiPath is integrated with UiPath Studio and UiPath Robots, allowing you to build automations that can leverage capabilities like rich relational data types, integrated security, and instantaneous provisioning and deployments while taking scale into account.

Data Service enables you to model, manage, and store business/transactional data in a centralized manner and seamlessly access it faster across multiple automations

UiPath Data Service enables organizations to model, create, share and store business data in a centralized and seamless manner for easy access from within UiPath products. Data Service offers:

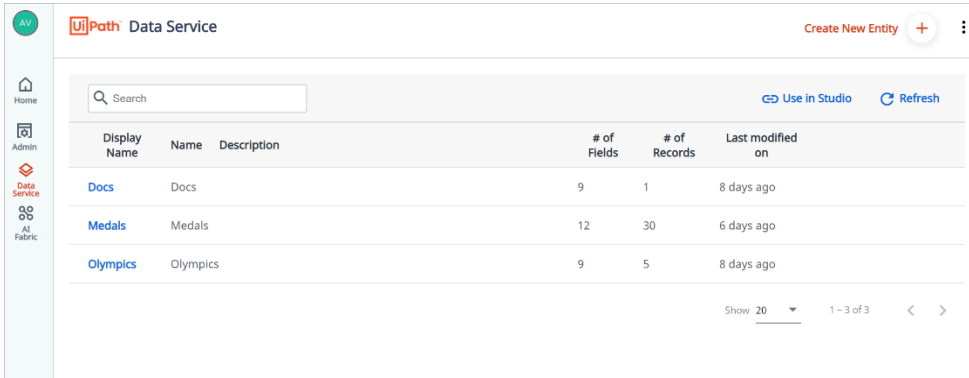
- Simple Data Modeling: Drag and drop interface for rapid data modeling
- Scalable Data Store: Aggregate data from multiple applications and store new data generated
- First-class Entry Objects
- Internal integration with UiPath Studio, Apps, AI Fabric and more
- External Integration: Open API to support integration with custom applications
- Security and Governance: Auto-scaled & dedicated instances, encryption in transit & rest, instant updates and integrated permissions.

Data Service supports multiple types of data creation like text, numeric, relational, files and more to suit your business requirement.

Connect with any enterprise or legacy system, database or other custom apps to aggregate and store data securely in a single location while allowing only required users to use the data with role-based access control.



Auto scale as your business needs grow with enterprise-grade security and manageability of Automation Cloud and get all the latest updates instantly



Display Name	Name	Description	# of Fields	# of Records	Last modified on
Docs	Docs		9	1	8 days ago
Medals	Medals		12	30	6 days ago
Olympics	Olympics		9	5	8 days ago

- Centrally model, manage, and store business transactional data
- Easily use data in attended and unattended automations and UiPath Apps
- Support for varied data types including text, numeric, relational and files
- Auto scales as your business need with Automation Cloud

## UiPath Insights

UiPath Insights is an RPA analytics solution that tracks, measures, and forecasts the performance of your entire automation program—so you can propel your automation journey to the next level. It offers a complete visibility over the RPA operations, with rich analytics.

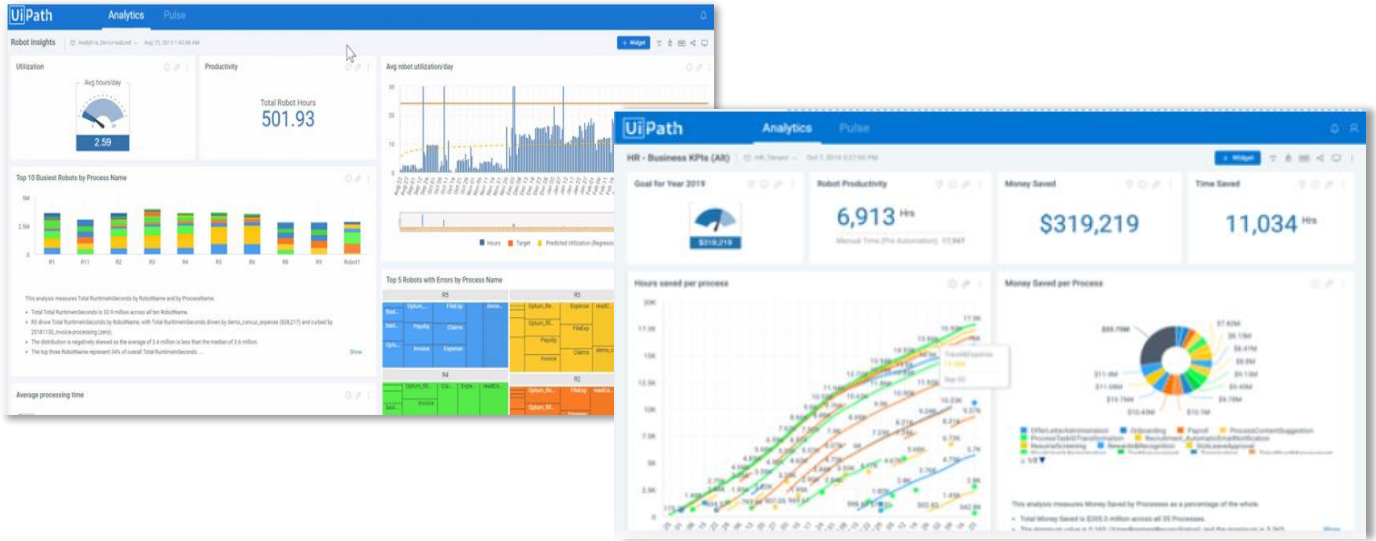
Insights comes with powerful, embedded analytics that measure, report and align RPA Operations with Strategic Business Outcomes, enabling the organizations to:

- Measure RPA operation performance
- Measure the business impact and ROI
- Forecast using integrated Machine Learning
- Track and troubleshoot process exceptions and bottlenecks
- Deep-dive into queues and transactions
- Use dynamic dashboards and shareable insights and smart alerts.

UiPath Insights enables health and performance tracking of all robot types and their accuracy, availability and capacity. Enterprise-wide, the users can now gain seamless visibility into business outcomes with custom-defined metrics and key performance indicators.

Insights also includes an out of the box library of dashboards including Processes, Queues, Robots, Licensing and Business ROI, extensible to include Long Running Workflows through the UiPath Marketplace.

## Actionable Insights Are Easier And Clearer With UiPath Insights





# Run Your Digital Workers – Attended, Unattended or Hybrid

## UiPath Robots

UiPath Robots are software robots programmed to execute processes modelled with UiPath Studio, that are controlled by UiPath Orchestrator.

Robots can work independently. They will check in with you if there is a question or exception – We call this **Unattended** automation. Robots can also work under your supervision. You decide when they stop, start or wait for you - We call this **Attended** automation.

	<p><b>Unattended Robot:</b> These robots utilize unattended automation to run high-volume, back office processes in a batch mode, 24x7x365. They operate without human touch, maximizing cost and performance benefits for any variety of back-office activity.</p>
	<p><b>Attended Robot:</b> Think “Digital Assistant”. These helpful collaborators reside on the employee machines and work along with them to speed up any task where human involvement is key – they are perfect fit for front-end activities such as service desk, helpdesk and contact center.</p>
	<p><b>UiPath Assistant:</b> The business users get a new tool called UiPath Assistant on their desktop to help them simply access, manage, and run the automations assigned. UiPath Assistant also allows business users to easily schedule their robot to perform tasks at the right time, get reminders about upcoming automations, and start running a robot from any existing tool.</p>

UiPath Robots are multi-skilled and are process and application agnostic. With the help of AI, UiPath Robots are learning new skills, including:

- **Visual understanding:** with AI Computer Vision, the robots recognize and interact with more-on-screen fields and components, including elements on virtual desktop interfaces (VDI), Flash, Silverlight, PDFs and images
- **Document Understanding:** Automate high volume of documents using your robots’ native machine learning capability to process documents
- **Conversational Understanding:** The robots can understand meaning from natural language inputs. They can answer questions and take directions, improving the customer and employee experience.

No Robots	Attended, In Tandem	Hybrid	Fully Unattended
<p>100% human</p>	<p>Human on computer with Robot process in background</p>	<p>Attended process uses human’s computer to kick off unattended background process</p>	<p>100% automation</p>
<p>Examples: Brainstorm with your team</p>	<p>Examples: HR Robot works with onboarding team to provision a new employee</p>	<p>Examples: Service Rep turns on Robot to delete customer data from multiple databases as part of a GDPR “right to forget” request</p>	<p>Examples: Robot processes invoices Robot loads data into a system like SAP</p>
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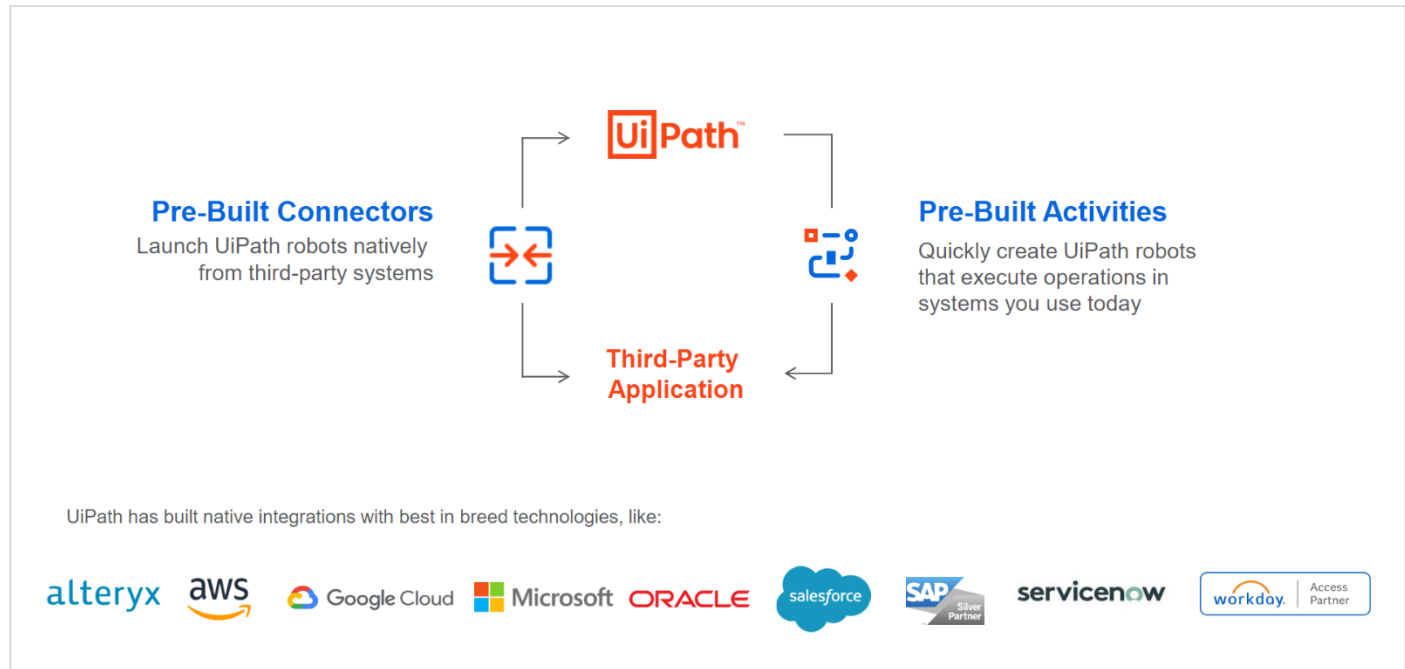
Both Attended and Unattended bots can operate in tandem in a ‘**hybrid**’ configuration or with a ‘**human-in-the-loop**’.

UiPath offers a wide range of possibilities for using combinations of attended and unattended robots.

# Native Integrations

UiPath integrations allow you to build robots that work with your application landscape. UiPath integrates deeply with best in breed technologies that you use today, so you can easily automate processes that involve multiple applications and/or lines of business.

<p><b>More automation across tools you use</b></p> <p>Build synergies across tools and teams by automating end-to-end processes across apps</p>	<p><b>Trusted by tech providers</b></p> <p>UiPath native integrations are backed or certified by technology providers</p>	<p><b>Faster time to value</b></p> <p>See rapid results with easy deployment and robust governance capabilities.</p>
30+ API-based integrations with applications you use today	Follow tech provider best practices and security standards	Drag and drop automation design
Built, supported, and maintained by UiPath	Collaboration with tech providers on development	Tools for IT teams to govern enterprise automation projects
Focus on depth of integrations – not just basic A-to-B connections	Open and flexible ecosystem	Robust support offerings



# Engage People And Robots To Work As One Team

## UiPath Apps

Apps is a low-code web-based, drag and drop business application studio that enables developers to build and deploy enterprise grade applications that deliver rich and engaging end-user experiences.

Use drag and drop controls to rapidly build visually appealing automation apps that unify business data from across the organization into a single interface. Modernize your enterprise processes by empowering developers to design sophisticated browser-based business apps from the ground up, in no time and without specialized skills. Seamlessly integrate with business applications and legacy systems with or without APIs. Connect to single or multiple automations that are attended or unattended or both.

Get seamless high-quality user experience across web and mobile by connecting different systems, processes and your automation through the user-friendly Apps. Users can run unattended automation from anywhere at any time with the cross platform and mobile friendly engagement layer.

The screenshot displays the 'Bank Agent Console' interface for a customer named Jamie Shah. It features several panels: 'Contact Information' (address, phone, email), 'Flags' (Travel Alert, KYC Up to Date), 'Activity History' (calls, chats, emails, and specific actions like 'Activate credit card'), and 'Recommended Actions' (Cancel Payment, Block Credit Card, etc.). A 'Products & Services' list includes mortgage, checking, and car loans. A 'Payment History' table shows transactions from August 2020, and a 'Transactions' table shows transfers and bill payments.

- The power of automation combined with the ease of low code
- Build everything, from simple forms to professional-grade apps
- Simple drag & drop design experience to rapidly create beautiful apps
- Works with attended, unattended and hybrid automations
- Web and mobile friendly
- Single-click deployment easily shareable across the organization

## UiPath Assistant 2.0

UiPath Assistant is a fully-governed, easy-to-use app that lets all employees interact with robots right on their desktops. UiPath Assistant helps employees work smarter by making it easy for them to work with robots – from a personal hub right on their desktops. The reimagined UiPath Assistant experience delivers an engaging experience for employees – to make it easy for them to incorporate automation into their daily work and to:

- access a list of pre-approved automations
- start, pause, resume or stop robots
- trigger a new automated process based on action
- launch automations from Microsoft Outlook, Excel and other programs they already use each day, leveraging a public API that connects Assistant to other enterprise applications

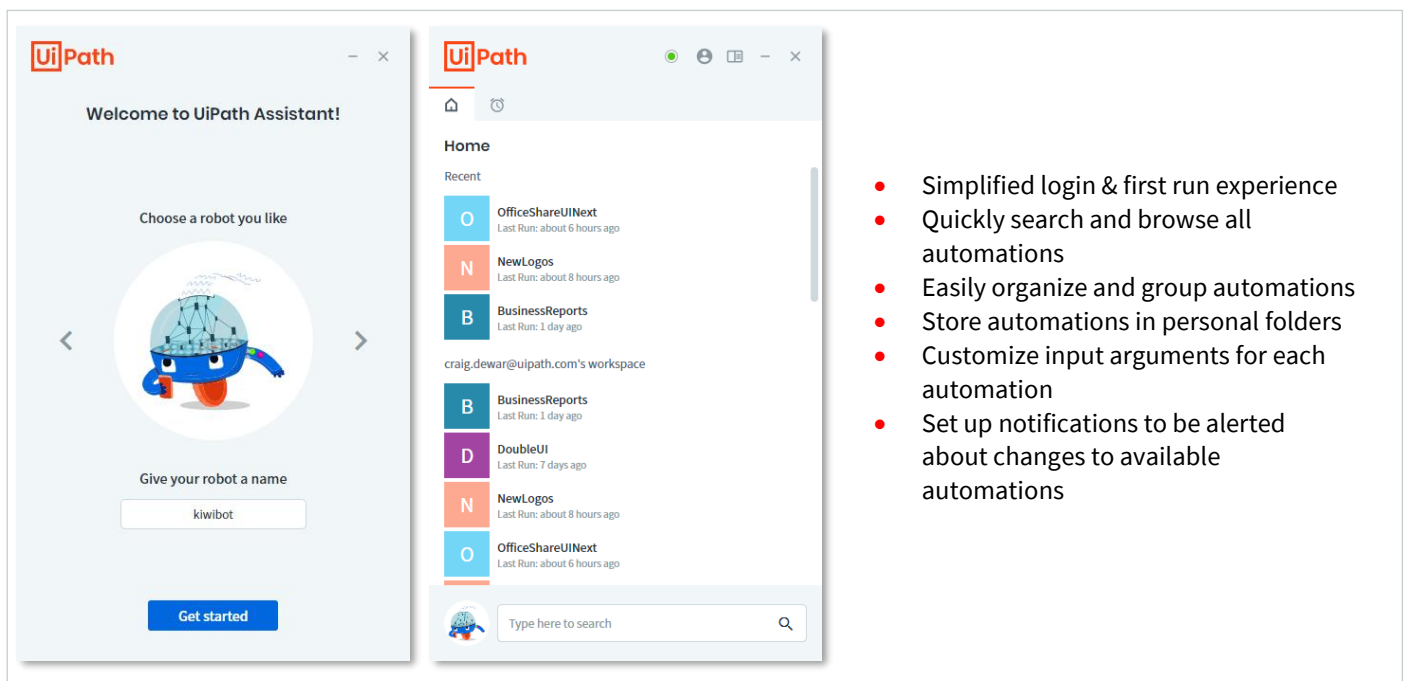
UiPath Assistant is optimized for seamless human-robot collaboration. Each user can customize and organize automations in Assistant to address their individual needs.

Thanks to the new one-click login, each user can start using Assistant without the need to setup a machine key and Orchestrator. The Single-Sign-On capabilities also ensure enterprise-wide security.

The UiPath Assistant is specifically created to turn the user's interaction with our robots into a great and enjoyable experience from the comfort of their desktops. It is the place where individuals can easily access, manage and run automations with just a couple of clicks.

The interface can be customized to better suit the person behind it by choosing an avatar and a name for the robot, organize processes in custom folders or maybe choosing another theme. All of this makes the UiPath Assistant our bridge between humans and Robots.

Users can easily connect Assistant to their company's Orchestrator using a **simplified login & first run experience**. This makes it easy for users to access all CoE-approved automations in a matter of clicks and allows CoE to easily manage their environment without any complicated set-ups



- Simplified login & first run experience
- Quickly search and browse all automations
- Easily organize and group automations
- Store automations in personal folders
- Customize input arguments for each automation
- Set up notifications to be alerted about changes to available automations

## UiPath Action Center

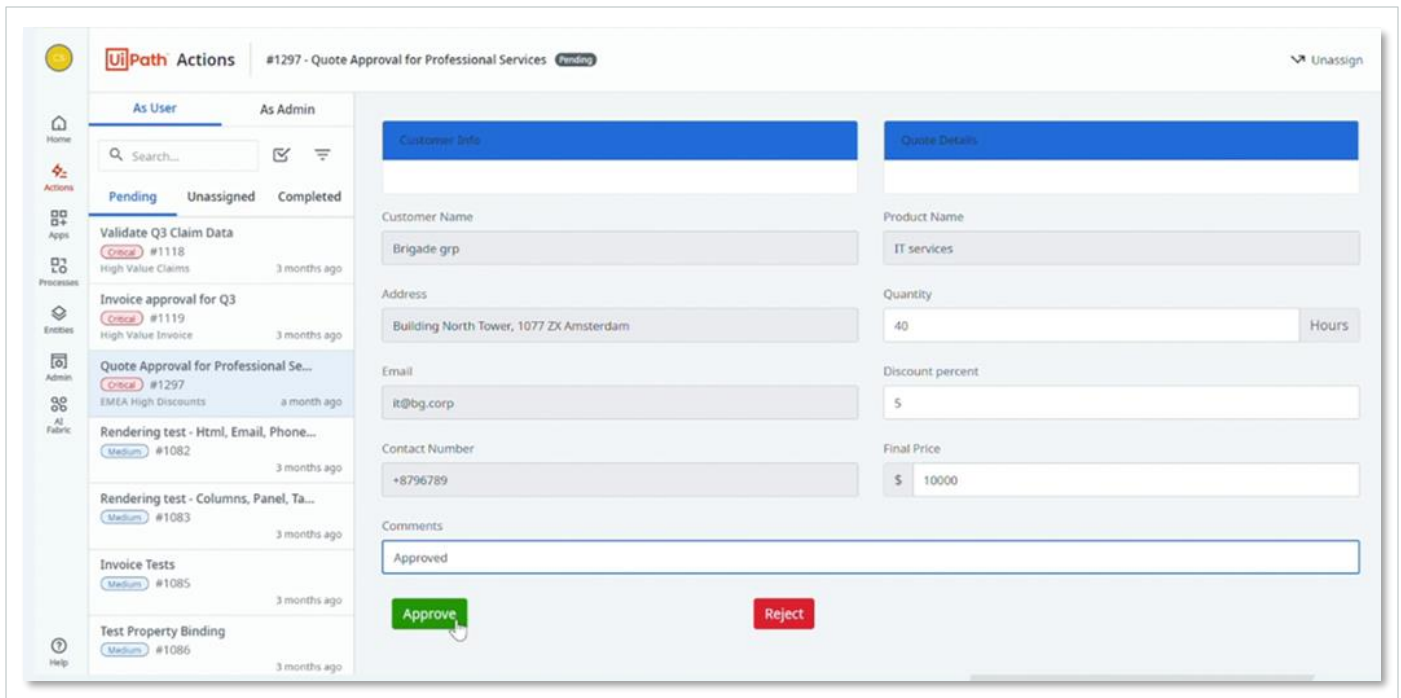
UiPath Action Center Orchestrates robot-human-robot tasks most effectively and the external events that resume workflows come from completion of human tasks. UiPath Action Center helps automate complex processes that require exceptions, escalations and approvals by bringing a **human-in-the-loop** to make required decisions.

Action Center enables you to automate more work from start to finish through seamless Human-Robot collaboration from a single platform. With Action Center you can:

- Automate a broader range of processes
- Scale automation across business units spanning multiple days/weeks
- Automate advanced processes by bringing humans into the loop to provide the necessary input

Simplify collaboration with Robots via Action Center where any exceptions, escalations, validations and approvals can be handled by the user. Unattended Robots automatically create tasks and dynamically assigns tasks to the right user when human intervention is required and move on to the next job. Once the required help from the human is complete the Robots are notified and can resume the automation.

The process monitoring feature helps gain visibility across business silos by monitoring the long running workflow from start to finish, as a single job, and get consolidated view of the Robot logs and resource bottlenecks.



## Chatbots

UiPath and Druid Chatbot offers seamless bidirectional communication between the robots and humans to fulfil customer requests end-to-end. UiPath brings together RPA and conversational AI to modernize your enterprise operations while accelerating growth and enhancing your customer and employee experience.

- **Converse with UiPath Robots:** Druid’s dynamic integration with UiPath Platform brings conversation capabilities to UiPath robots allowing robots and humans to interact using natural language and process the requests.
- **Easily bring AI into customer requests:** Leverage the AI powered RPA platform and the no-code authoring chatbot platform across all industries to automate customer request fulfillment involving modern or legacy systems with the choice of cloud, hybrid and on-premises deployment
- **Engage employees more productively:** Empower employees with cognitive chatbots that prevent employees from constantly switching between different applications (app fatigue) and motivating them to do higher value work leading to increased efficiency

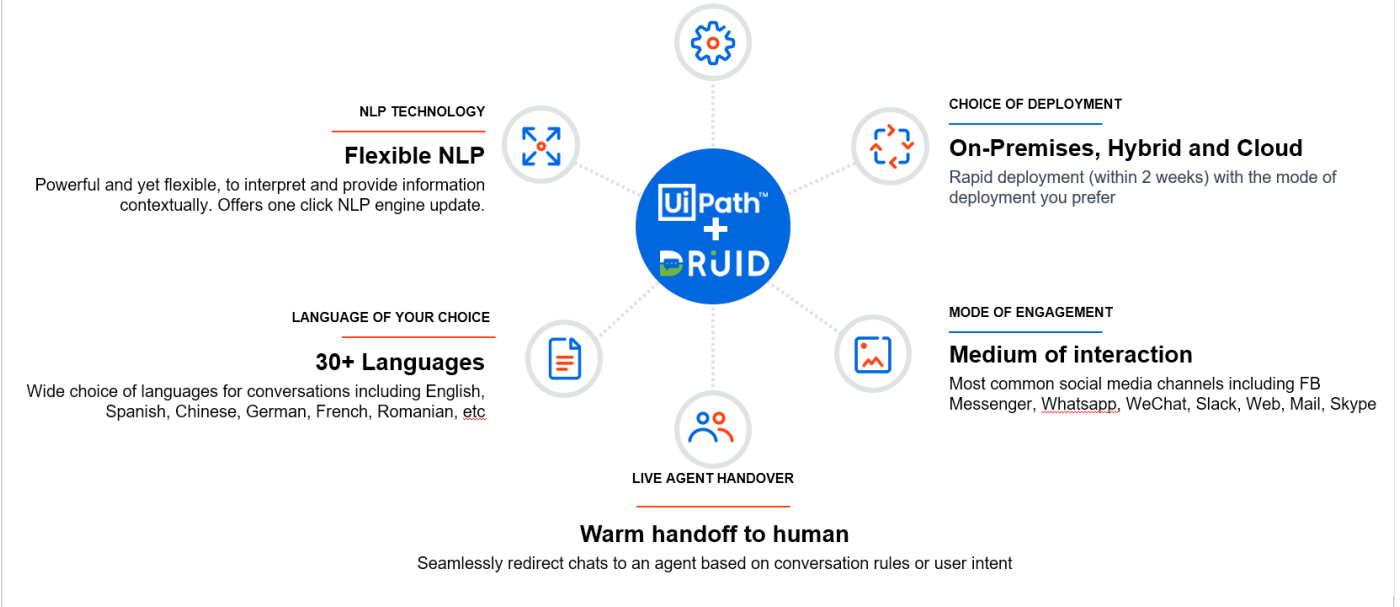
The Druid chatbot integration comes with a powerful, yet flexible NLP technology to interpret and provide information contextually and native support for over 30 languages. 250+ Pre-built, ready to use conversational AI templates covering business scenarios across multiple industries and roles are available on-premises, hybrid and cloud.

Seamless user experience with access to different business applications from a single chatbot window and take actions on the go with mobile.

Automatic routing of job to humans based on predefined rules or no intent recognition and instant hand off of specific requests to Live agents.

## 250+ Pre-built, conversational AI templates

Ready to use pre-configured skills for business scenarios across multiple industries and roles



## 4. Appendix

### 4.1 Key differentiators

Our cultural ethos is to be humble, challenging, and transparent. This allows our customers to most efficiently scale automation within their organizations and achieve the optimum ROI. The UiPath RPA Platform is developed with these 5 critical customer benefits in mind:

- 1) **Open Platform** - We believe in democratizing RPA by providing an open platform. Open to Extend, Open to Use, and Open to Learn, we have over 700 technology and service partners for technical integration and implementation along with the ever-popular RPA Academy and Community, hosting over 300k members
- 2) **Rapid Results** – Proven to deliver 40% faster automation design and deployment, compared to other RPA solutions, UiPath is focused on delivering Rapid ROI. This is achieved through:
  - Faster development and maintenance. With its open, extensible and industry-standard designer, UiPath is focused on usability and enables users without coding knowledge to map business processes for automation in an intuitive, visual, workflow-like designer tool, leading to fast development and reduced maintenance time.
  - Faster Implementation. The UiPath solution can be implemented 2 to 3 times faster than other RPA solutions. Faster implementation dramatically reduces initial investments and boosts ROI.
  - Faster Robots. UiPath Robots are generally **50% faster than other robots** on the market. All our proofs of concept can testify. Faster robots mean more work done in short time done and increased ROI.
  - Faster and Easier AI Integration: UiPath provides the easiest integration with machine learning (ML) models through pre-built activities in UiPath Studio. UiPath pragmatic AI solves real customer problems and delivers ROI fast.
- 3) **Path to AI** - UiPath Robots are learning new skills to advance the sophistication and maturity of your automation journey. These AI skills introduce new cognitive capabilities, enable access to new sources of unstructured data, and improve automation efficiency and robustness. UiPath delivers the highest level of automation accuracy with UiPath vision capabilities and offers best-in-class VDI automation.
- 4) **Automation at Scale** – UiPath delivers RPA at enterprise scale. Our platform can support more than 25K robots. Multi-tenancy in Orchestrator makes it easier to scale at enterprise level as you can create up-to 10k tenants with just a few clicks.
- 5) **Security** - The UiPath Platform has been designed for today's cyber landscape and includes defense-grade security and auditing. Our technology **is trusted as secure by more than 350 government agencies** around the world. Moreover, UiPath has received the **Veracode Continuous Verified** certification, the highest level of the Verified program from Veracode. This certification establishes that UiPath Platform has the following security features: Integration of Security Tools & processes, passing through comprehensive Security assessments and vulnerability tests, Secure Coding Practices, Security Champion and OWASP Secure Coding Practices.

UiPath offers the only platform built for hyperautomation, a Gartner top strategic technology trend for 2020. Multiple tools and technologies are seamlessly integrated to help accelerate your automation program. This will help achieve massive scale and realize ongoing business value. Expedite automation time-to-value and ongoing ROI with hyperautomation across the entire lifecycle.

UiPath is the only service provider in the international marketplace today who can offer **Robotic Process Automation (RPA)** as well as **Process Mining** in one platform, as well as **artificial intelligence (AI), Insights, and Document Understanding**.



## 4.2 Security and Compliance

**UiPath knows that trust is important to our customers. Security, privacy, and compliance are the foundation of our platform.**

Every UiPath product is designed and developed with security in mind. Security is built directly into our development lifecycle, by performing both automated security scans and red team style penetration tests on every build. We submit our releases to independent third-party review by Veracode at the highest level to ensure that our security is more than trusted, it is certified.

UiPath RPA Platform is **Veracode Continuous Verified** - the highest level of the Verified program from Veracode, Leader in the Gartner Magic Quadrant for Application Security and builds on the security processes embedded in the development lifecycle of our Platform. This certification brings a set of benefits to our Security story such as:

- Integration of security tools & processes into our product development workflows.
- Passing through comprehensive Security assessments including Static & Dynamic code analysis, Open Source Software vulnerability assessments, Manual Penetration Testing
- Completion of issue mitigation review resulting in Zero medium or higher known vulnerabilities
- Documentation of a 30-day remediation timeline for continuously ensuring the highest security level.
- Secure Coding Practices training for our Engineering teams.
- Security Champion – advanced security training and working together with our Engineering teams to ensure secure coding practices.

UiPath has also received the ISO27001 certification for the UiPath Core Platform as well as the UiPath Cloud services.

UiPath has a Global Cyber Security Policy that defines the cyber security procedures and measures implemented by UiPath and subsidiaries in order to protect the confidentiality, integrity, and availability of the company's information assets in accordance with business objectives and applicable laws and regulations. UiPath's Cyber Security governance framework complies with the requirements of **ISO 27001**.

Additional information is available here: <https://www.uipath.com/legal/trust-and-security>

## 4.3 High-Level Architecture

UiPath has a layered architecture which has the Robots in the Client-side and the Server components (the Orchestrator and the Database server) in the server-side. Therefore, UiPath is capable of providing horizontal scaling by enabling addition of Orchestrator nodes; or providing vertical scaling by enabling addition of robots.

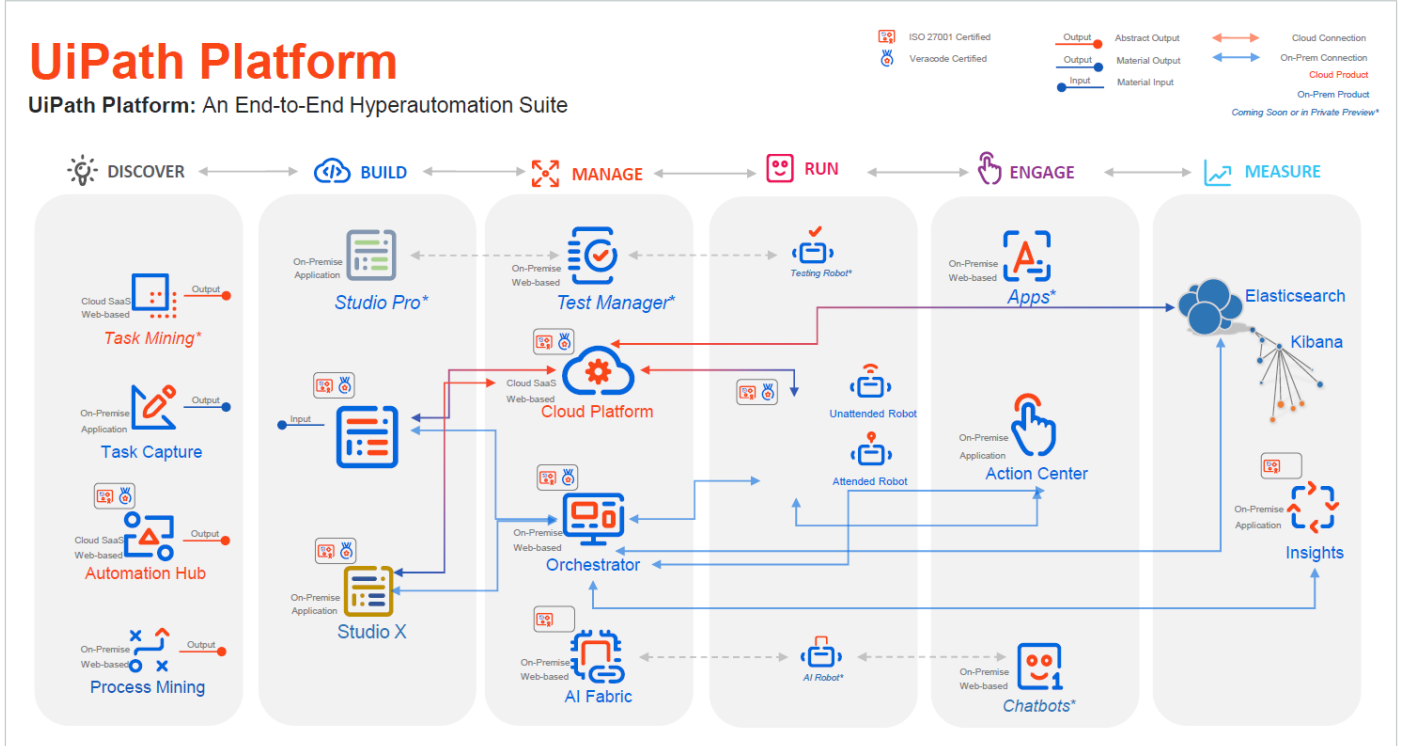
UiPath RPA platform can be installed in cloud or on premises, on physical or virtual machines. As virtualization solution, it will run on VMWare, Microsoft Hyper-V, Citrix XenServer, XenDesktop, Windows Azure virtual machine, Amazon Cloud virtual machine, etc. No matter the IT infrastructure/system change, or if new business requirements arise, our platform is easily adaptable.

Proven, scalable, and secure architecture offering multiple automation models, multi-tenancy and flexible deployment will allow scaling across the organization within a single implementation and can be rolled out at a touch of a button.

UiPath delivers RPA at Enterprise scale. UiPath platform can support more than 25K robots and multi-tenancy in Orchestrator makes it easier to scale at enterprise level with just a few clicks.

The high-level overview of the UiPath suite deployment can be found below





## 4.4 The UiPath Ecosystem

A strong differentiator for UiPath is the Learning Culture. UiPath Learning programs help UiPath customers and partners make better informed decisions when researching, selecting, deploying, staffing, and growing their RPA implementations.

- a) UiPath offers free of charge online documentation (installation guide, troubleshooting, FAQ) for the platform components:
  - UiPath Orchestrator: <https://docs.uipath.com/orchestrator>
  - UiPath Studio: <https://docs.uipath.com/studio>
  - UiPath Robot: <https://docs.uipath.com/robot>
  - UiPath Activities: <https://docs.uipath.com/activities>
  - And KB Articles: <https://www.uipath.com/kb-articles>
- b) UiPath offers a **free E-Learning platform** (<https://academy.uipath.com>), that speeds up the learning and proficiency curve and an active community forum with more than 60k active users. Training for development, management and reporting consists of three levels: starting with the Foundation course, followed by the Orchestrator and then the Advanced courses. These courses are available online, free of charge and are self-led through the UiPath Academy. UiPath offers both technical and non-technical training for developers and business users.
- c) **The UiPath Connect Marketplace** is a platform that connects developers with best rated professional services, APIs and products, giving them access to a rich use case library and reusable components to expand the automation penetration in their businesses. The purpose of UiPath Connect Marketplace to share knowledge, solutions, increase re-use to continuously accelerate the implementation and reduce RPA deployment effort. UiPath Connect Marketplace facilitates the exchange of RPA reusable components such as: custom activities, snippets, automation frameworks, connectors, dashboards, machine learning models, industry specific solutions and many others.
- d) **Largest RPA Community – more than 750,000 users across 200 countries.** We explore, learn and grow as RPA students and professionals around the globe. It provides a platform to engage and reward employees for contributing to the

automation program. The UiPath Community is a mix of programs, events, and digital platforms, including UiPath Products that the user's access to gain knowledge and skills, to collaborate, to offer support, to improve the experience, or to create new content for the Community.

- e) UiPath has an abundance of well-trained RPA professionals to support clients and implementations. UiPath offers **Customer Success Managers** and **Partner Success Managers** to support ongoing client RPA adoption and satisfaction. UiPath's Customer Success team advises and guides a wide variety of customers and partners, ensuring they launch UiPath successfully, adopt it widely and **are continuously driving business value from UiPath.**
- f) UiPath has **more than 1000 partners** to help support our customers with implementation, consulting services and training. Our Business Partners range in size from large global consultancies (e.g. PwC, Deloitte) to smaller, regional and country-focused partners. Our Technology partners offer complementary technology and RPA tools and include major companies in: BPM, Cloud Platforms, AI and Machine Learning, Process Mining and Discovery, NLP and Chatbots, Infrastructure and Security and others. The list with our official partners can be found here: <https://www.uipath.com/partners>

Thank You!

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