UiPath 2021.4 FTS Release Partner Technical Mastermind AMER & EMEA

Session 5 of 6: Process understanding The webinar will start soc

11th of May 2021



21.4 Partner Enablement Plan



https://www.uipath.com/21.4_technicaltraining_amer_emea

Here's a quick look at our schedule

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Desktop Products	AI/ML	Test Suite
Explore the latest features of the Studio	Enhance your automations with Al	Find out about the latest features on
amily, Robots and the UiPath Assistant		RPA and Software testing
April 27, 2021	April 29, 2021	May 4, 2021
3:00pm GMT	3:00pm GMT	3:00pm GMT
Register Now →	Register Now →	Register Now →
ß		23
Apps, Activities, Connectors	Process Understanding	Cloud Services
and the second	Al-powered discovery and prioritization	Rapid expansion of the UiPath
Start deliver engaging experience using	A powered dibeovery and prioritization	
Start deliver engaging experience using UiPath's low code-app builder	of the most impactful automations	Automation Cloud([™]) capabilities
UiPath's low code-app builder	of the most impactful automations	Automation Cloud(™) capabilities

Quick Housekeeping notes

https://www.uipath.com/partnerportal

United by an ambitious purpose

Thank you to our partners for contributing to our combined success.

Read the IPO blog



Deal Registration

Protect your investment, speed the sales cycle, and coordinate resources with UIPath. View the status and manage your deal registrations, get started today.



Explore The Automation Platform

UiPath is the automation platform of choice for the enterprise to successfully scale and manage an automation program. The 21.4 release delivers a host of exciting new features and products that extend capabilities.

What's New:

UiPath Platform 21.4 Fast Track Release
 UiPath Al Fabric is now UiPath Al Center - Your control center of
 Al

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Introducing Role-Based Training!

UiPath now offers our Partners the same training we provide to our own internal teams to sell and deliver the industry-leading UiPath platform. Explore the different roles, partner specific training and get started now!

What's New:

Sales Training - 20.10 Platform Release
 Technical Updates - 20.10 Platform Release
 Role Based Training: Sales
 Presales
 RPA Developers, Architects & Engineers



News & Announcements

Get your tech teams updated on the NEW platform.

UiPath 21.4 Fast-track Support Release Technical Training

Keeping to our commitment of making sure you are technically informed, we are providing an exclusive series of virtual sessions planned over the next few weeks – each covering a specific product of the end-to-end platform for automation.

Click the link below see details on each session and to sign up!

21.4 Technical Session Deep Dive: APAC & India Regions 21.4 Technical Session Deep Dive: AMER & EMEA Regions



Quick Housekeeping notes

- Please enter your question in the Q&A box.
- We will address the questions along the way, at the end of the presentation or by follow up email.

FAQ: Is this webinar recorded?

Yes, this session is recorded and will be posted on the same page where you registered for attending.

•	Q&A	-00-	
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	Aidan Crosbie would like to answer this question live	<u>à</u> .	
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Ui Path Reboot[™]

Key Themes in the 21.4 FTS release



Enterprise-scale management and governance of your automation program

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Al-powered discovery, prioritization and integrated development of the most impactful automations



Upgrades for all user experiences from everyday business users to professional developers



Rapid expansion of Automation Cloud capabilities





Become a fully automated enterprise with the UiPath Platform

AUTOMATION CLOUD



HYBRID

ON-PREMISES

PUBLIC CLOUD

Process Understanding Product Family

Partner Enablement Session 2021.4 Release



UiPath Platform for the fully automated enterprise







Path Reboot™ Work.

Agenda



1.1.1







Agenda Task Mining

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1.1.1

01 What is Task Mining?

- 02 What benefits Task Mining brings?
- 03
- Who is Task Mining for?
- 04 Licensing



How does it work? (Demo)

Challenges with getting most of your automation potential









Lack of unified approach to prioritizing automation candidates to scale beyond initial wins Expensive and time-consuming traditional approaches that deliver subjective outputs Difficult to understand the as-is process, deviations and how employees are performing their tasks

Introducing UiPath Task Mining

Ui Path Reboot™ Work.

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Task Mining captures employees' day-to-day desktop activities and applies AI to identify repetitive tasks that have high potential for automation enabling more efficient and productive work.



Leverage a low-touch way to discover employee workflows





Centralized, controllable capturing process from admin portal





Collect action level screenshots triggered by mouse clicks & keystrokes



Capture real employee data without interruption to their activities



Single sign on experience through UiPath Automation Cloud

Use AI to scientifically identify repetitive tasks & key task metrics





Al-powered data-driven approach analysis identifies list of repetitive processes to reveal prime automation candidates



Detailed metrics about each process (time spent, apps use, execution time etc.)



Self-service analytics and model management experience powered by seamless integration with UiPath AI Center

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Visualize results to understand details of each process









Determine the most frequent path and variations i.e. different ways employees execute the same process

- Drill-down into each trace including a process replay
- (D) Rich filtering options to show traces that match the criteria: no. of actions, execution time etc.



Flexibility to recompute the ML model based on user validation inputs

Accelerate automation journey with one-click exports



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Easily document the process: Oneclick to generate Process Definition Document (PDD)



XAML export serves as a starting point for building automation with UiPath studio

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UiPath Studio (XAML)	

Secure & scalable approach to analyze sensitive data



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Encryption at rest and during transit. Decryption using customer specific private key.

Ability to inspect and removesensitive information before upload

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Only applications in the allowed list will get captured



Tenant data isolation ensures data from each tenant is logically separated from others for access and authorization controls Build an enterprise-wide pipeline of your best automation projects— scientifically and securely



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Rapid and cost- effective	Discover without disruption	Al-powered objective insights	From discovery to automation
Forget about expensive and time-consuming traditional approaches that deliver subjective outputs. Let the intelligent technology do hard work for you.	Securely capture and aggregate employees' activities—including steps and execution time— without interrupting their work.	Advanced machine learning models tease out the most frequent task patterns from the data. Then they identify repetitive activities that could be automated.	Get the benefit of integration with the end- to-end UiPath automation platform

Secure and scalable approach

Setting up your task mining study for success





Making task discovery easier for everyone











COE Leaders

- Save cost and time vs. a traditional consulting led approach
- Engage business teams with an objective view of opportunities

Busines Analysts

- Avoid time-consuming time and motion studies and employee interviews
- Reduce time on process documentation

RPA Developers

- Get an accelerated starting point with an automation skeleton
- Reduce time on process gathering before automation

Employees

- Low-touch process ensures no impact to productivity
- Privacy & GDPR consent compliant



Default Bundling: Task Mining License + Prepaid 10K Units









Agenda Process Mining

- 01 What is Process Mining?
- 02 What benefits Process Mining brings?
- 03
- Who is Process Mining for?
- 04 Licensing
- 05 What's new for Process Mining ?
- 06 How does it work? (Demo)



An integrated solution Image: Process Mining

Use intelligent algorithms to **automatically** reconstruct the **real** process with existing data

Verify gut-feeling about pain points in business processes and how to optimize them



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Turn process complexity into opportunity



Understand **impact** of automation on what matters to your business, continuously



Discover, automate and monitor your complex, end-to-end business processes

Path Reboot[™] Work.

Finding automatable work | Challenges and Impact



Current Challenges

Business Impact



Time-consuming and expensive projects that scratch the surface of processes



Risks and costs associated with waiting to automate, or automating inefficient processes



Processes that are considered too complex to tackle for automation, stay inefficient



Who uses Process Mining?



Automation Teams



Scaling and accelerating automation

Process Teams



Optimizing processes

Continuous Improvement Teams

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Company wide operational efficiency

Licensing Model



User based (per year)

Process Mining Server*

Many customers use separate servers for different departments, but we don't place a limit on the number of processes a server can run.

Business User

Full insight into the processes of your organization. Detect inefficiencies and RPA opportunities. Monitor performance and compliance and utilize UiPath Action Center to proactively optimize your processes.

Developer User

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Full access to the design and development functionality of UiPath Process Mining and the entire UiPath RPA Platform, develop, customize and administrate platform applications.

• Non-production server

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- 2021.1
 - Automation Dashboard in AppOne
 - Create App from **Base App**
 - Upgrade customized App
 - Other improvements:
 - Detail slider for the Process Graph
 - Custom labels for the Process Graph
 - Column sorting of grid charts
- 2021.4
 - Send automation ideas to Automation Hub
 - Single Sign-On
 - Root-cause-analysis dashboard in AppOne

Ui Path Reboot

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- **Connectors** (separate release cadence)
 - SAP Order-to-Cash for AppOne
 - SAP Purchase-to-Pay for AppOne
 - JDE Order-to-Cash for AppOne (coming soon)
 - JDE Purchase-to-Pay for AppOne (coming soon)

- **Discovery accelerator Purchase-to-pay** (Public Preview April 26)
 - SAP Connector for P2P Discovery Accelerator.
- **Discovery accelerator Order-to-cash** (Coming soon)
 - SAP Connector for O2C Discovery Accelerator.

What's new for Process Mining? Single Sign-On

Description

- Configure Process Mining Server for Single Sign-On through
 - Azure Active Directory
 - Integrated Windows Authentication

Customer benefits:

- Simplified sign-in experience
- Integrate with existing IT user management infrastructures
- Enhanced permission management through groups;

ning Server for gh

Login	Login
Login name	Login name
Password	Password
LOG IN	LOG IN
Sign in with Microsoft	Sign in with your Windows domain

ogin

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Create app from base app & upgrade customized app

Description

- Use released app as template for your new app
- Dedicated function for upgrading your customized app

Customer benefit

• **Improved** and more **user friendly** experience when creating & upgrading applications



General		
application. E application is choose wisel Application n	vill create a new application which can be based on By setting the 'Base app' to ' <none>', a completely n s created. Warning: you cannot rename the applicat ly. names must start with an alphanumeric character, a</none>	ew ion, so
contain hyph	iens (-), underscores (_), and full stops (.).	
Name	Му арр	
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SAP Purchase-to-pay & SAP Order-to-cash connectors for AppOne





Purchase-to-pay Discovery Accelerator (Public Preview)

Description

- Set of dashboards & charts dedicated to the **procurement process**
- Extension with Accounts Payable on the road map

Use cases:

- Analyze, monitor and prevent Maverick
 Buying in the procurement process
- Increase productivity by standardizing how POs and PRs are processed with automation
- Improve supplier on-time delivery rates

Release package includes **dedicated SAP** P2P Connector


What's new for Process Mining?

Root-cause-analysis dashboard in AppOne

Description

 Discover what causes undesirable behavior in your end-to-end processes

Customer benefit

- Quickly understand patterns in data which point to negative behavior in processes
- Undertake **corrective action** to prevent it, such as automation.

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What's new for Process Mining? Automation Dashboard



Description

- Previous automation Dashboard has been replaced with dedicated dashboard for finding automation opportunities in the process
- Main metrics:
 - Automation rate
 - Manual event cost
 - Manual processing time
 - Number of manual events

Customer benefit

 The dashboard not only analyzes as-is situation, but guides you in which activities can be automated for process improvement

What is the au	tomation potential	?							
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Pay employee reimbursemer	nt			1	00%	\$ 0.00	0s	0	80
Pay invoice				91%		\$ 1,802.61	52d	136	1,436
Approve invoice				90%		\$ 2,723.22	92d	116	1,114
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What's new for Process Mining?

Send automation ideas to Automation Hub

Description

- Send automation ideas discovered in Process Mining to Automation Hub
- Use Automation Hub to analyze & prioritize the ideas and turn them into real automation implementation.
- Once implemented, analyze the **impact of the automation** on the end-to-end process

Customer benefits

• Standardized way to manage and prioritize automation ideas, regardless of their source



Reboot" Work.

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Agenda Task Capture

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01 What is Task Capture?

02 What benefits Task Capture brings?



Licensing



What's new for Task Capture ?



How does it work? (Demo)

Task Capture: Process Documentation made easy





Task Capture features

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PROCESS DIAGRAM BUILDER

IN-DEPTH PROCESS CAPTURE

INTUITIVE EDITING PANEL

EXPORT AND SHARE PROCESS DOCUMENTATION

PROCESS DIAGRAM BUILDER



Manually create a workflow diagram first with the **Build Diagram** mode.

This enables business analysts and SMEs to build a comprehensive process diagram:

- Capture and customize sequences and decisions points
- Merge process sequences
- Easily kickoff screen captures for each business step



Easily generate and visualize your business process maps

IN-DEPTH PROCESS CAPTURE



Task Capture automatically documents the way you perform a process.

With **Capture Process** mode you can select the level of detail you want to record (generate map automatically):

Capture detail first, then build map



Reduce time spent on manually documenting processes

INTUITIVE EDITING PANEL

After you've created your initial process map, you'll want to add some additional details for each action.

Ui Path

HOME

Google

Google

Google

← Back to Diagram

Google Chrome

4 actions • 5.7 sec

FILE

EDIT

In the **editing panel** you can:

- Annotate each action with title and description
- Crop images and highlight important details ٠
- Add text boxes, shapes and sequence ٠ indicators
- Blur sensitive information
- Recognize and copy text from screenshots with built in OCR

Enhance your documentation with ease



Task Capture - HR Process* /

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Edit action

EXPORT AND SHARE PROCESS DOCUMENTATION

Export your process map as a Process Definition Document (PDD).

- Customize an existing template or utilize our library of curated templates
- Adjust image quality and size
- Add and edit document properties

Export your documentation to a XAML file, ready to use in UiPath Studio as a workflow skeleton – or export the process map as an image.

Easily share the PDD or XAML with stakeholders and developers





What's new for Task Capture?

- Redesign of User Interface
- Interactive Sign in Option
- Configure Capture Settings
- Add **Swimlanes** in the diagram
- Other improvements:
 - Deployment of custom PDD templates (2020.10.1)
 - Import of XAML files (2020.11.1 Public Preview)
 - Capturing improvements (2020.10.3)
 - Proxy settings (2020.10.3)



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What's new for Task Capture? UI Redesign



Description

 Task Capture has been redesigned to be more aligned with the UiPath platform

Customer Benefits

- Consistent user experience across different UiPath products
- Improves user onboarding to the UiPath platform



What's new for Task Capture? Interactive Sign in

Description:

 Activate Task Capture by using the UiPath Automation Cloud account

Customer benefits:

• Simplified activation of the product

Prerequisites:

- User License Management feature should be enabled in UiPath Automation Cloud
- User should have a license assigned in UiPath Automation Cloud



Want to find out more? Visit the documentation page

Reboot" Work

Path

What's new for Task Capture? Capture Settings



Description

- Toggle between **Detailed** and **High level** Capturing mode
- Use **Capturing hotkeys** to pause/resume or stop the capturing process.
- Choose if keyboard inputs and text under the cursor are automatically saved and displayed in the action description.

Customer benefits

- More **control** over the capturing process
- Avoid capturing of sensitive information (passwords, personal information etc.)
- Minimalizes need for post-editing of the documentation

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Want to find out more? Visit the <u>documentation page</u>

What's new for Task Capture? Swimlanes



- Structure the process map by visually grouping the elements
- Structure can be depending on user roles, process stages, departments etc.
- **Customer benefits**
- Create more informative process maps



Want to find out more? Visit the documentation page

Reboot™ Work

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What's new for Task Capture?

Other improvements

Deployment of custom PDD templates (2020.10.1)

- Supports creating consistent documentation within a company
- More information available <u>here</u>

Import of XAML files (2020.11.1 Public Preview)

- Enables RPA developers to generate documentation for existing automations
- More information available <u>here</u>

Capturing improvements (2020.10.3)

- New 'Start' button provides the possibility to prepare the environment before starting the capturing
- Action title and description can be specified during the capturing
- More information available <u>here</u>

Proxy settings (2020.10.3)

- Configure Proxy settings for Task Capture
- More information available <u>here</u>



Licensing Plan



Licensing Information

- Task Capture is included with Automation Hub
- Task Capture is included in every user role SKU

Community Edition

- You can access the Community Edition here







Automation Hub



Agenda Automaton Hub



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What is Automation Hub?

03 Licensing

04 What's new?



How does it work? (Demo)

RPA is key to accelerating your competitive advantage, but how do you:



Scale beyond the initial quick wins?







Ui Path[®] Automation Hub

Where your company...

- Connects to drive automation opportunities
- Identifies and manages automation pipeline
- Stores process documentation
- Securely leverages reusable automation components



Automation Hub is the only way to



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Manage the entire automation lifecycle with instant visibility and control \mathbf{x}

Foster both top down and bottom up automation opportunities Ê

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Coordinate multi-vendor automation environments

Automation Hub is how thousands of companies





What's new for Automation Hub?

Focus points of this session

- Automation Hub as service in Automation Cloud
- Consume automations directly from Automation
 Store
- Process Mining integration
- Customize Submit an idea
- Audit logs
- Redesign
 - Reorganize explore automations and explore ideas page
 - Automation Ideas Submission redesign
- Import Pipeline

Other features

• Updates to cost and planning reports

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- Added Open API calls
- Localization in Spanish and Portuguese
- Geo-hosting support for Japan, Australia and Canada

For details see release notes and docs.

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What's new for Automation Hub?

Automation Hub as service in Automation Cloud

Description

• Automation Hub is now available as service in the Automation Cloud

Customer Benefits

- Multi-tenancy
- Easy access via cloud.uipath.com
- Migration options for existing customers
- **Centralized user management** by managing users in Automation Cloud for all cloud products
- Azure Active Directory integration





What's new for Automation Hub? Automation Store

Description

- Attended automation shared by the citizen developers & CoE members can be **published to the Automation Store** when the automation goes live in production.
- Users can browse these automations in the Automation Store and instantly trigger their download into the UiPath Assistant.

Customer Benefits

- Increasing visibility on your attended automation program
- Scale the usage of your attended automations and drive more savings
- Reward the citizen developers by promoting their work



What's new for Automation Hub?

Process Mining integration

Description

• Directly **send automation opportunities** discovered with UiPath Process Mining to Automation Hub.

Customer Benefits

- The integration makes it simpler to **move** from the **discover** to the **build phase** in automation.
- Centrally manage automation ideas regardless of whether they are crowdsourced from employees or discovered in Process Mining.

	Explore Ideas > Automation Hub Idea						
	Automation Hub idea						
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	B Finance & Accounting				Inter	ested	Follow
	About Cost Benefit Analysis Documentation 1 Components 0 Collaborators	1					
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	Submitted by: daphne.nandez@uipath.com	Automation %	100				
	Users involved: Rebecca Love (16.53%), Medge Patel (15.84%), Macy Hurst (15.36%), Gary Le		75				
	(12.41%), Hunter Garcia (12.21%), Cruz Abbott (7.48%), Lars Walker (7.48%), Cullen Combs (7%),	Auto	50				
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	Environmental Stability						

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UilPath Reboot[™]

What's new for Automation Hub? Audit logs

Description

System Admins & Account Owners can now access audit logs containing information about the **user activity** and **Open API calls** on their Automation Hub.

Customer Benefits

Supports **security** efforts by providing ۲ visibility on the activities happening in Automation Hub

Automation Hub	rkspace Explore Dashboards	Admin Console			
ount Manage Users Platform Setup	Manage Components				
Audit Logs					
	Service Name	Date Range	Size		
	Event Log	2021-02-07 - 2021-02-14	1.99 MB	Download	View
	Event Log	2021-02-07 - 2021-02-13	474.83 KB	Download	View
	Tenant Service	2021-02-07 - 2021-02-14	157.49 KB	Download	View
	Tenant Service	2021-02-07 - 2021-02-13	589.01 KB	Download	View
	Open API	2021-02-07 - 2021-02-14	439.35 KB	Download	View
	Object Reference	2021-02-07 - 2021-02-14	7.15 MB	Download	View
	Object Reference	2021-02-07 - 2021-02-13	185.3 KB	Download	View
8 Get Started	Event Log	2021-02-14 - 2021-02-21	1.65 MB	Download	View
etstarted	Event Log	2021-02-14 - 2021-02-20	3.17 MB	Download	View

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Ui Path Reboot[™]

What's new for Automation Hub?

Customize submit an idea

Description

• System Admins can now **customize** the Share an idea form.

Customer Benefits

- Customize the form to better match the target audience
- Capture the information that will help make informed decisions
- Focus on key factors that matter for the company's goals



What's new for Automation Hub? Import pipeline

Description

 Automation Hub offers the option for System Admins to import automation ideas collected outside of Automation Hub via a CSV template.

Customer Benefits

- Get started fast with Automation Hub
- Create and manage one centralized pipeline for your automation ideas

Set up:	×
Download CSV Template	
Fill this CSV with the details of your automation	ideas.
Upload CSV	
Once you upload it here the automation ideas w Automation Hub.	vill be synced into

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UiPath Reboot[™]

What's new for Automation Hub? Redesign

Description

- Share an Idea flow is now redesigned in a single page, with more specific answer options
- Explore idea and explore automation page is now combined into Explore Automation Program

Customer Benefits

 Better user experience when submitting & exploring automation ideas



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UiPath Reboot™

Licensing Plan



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Free Two-Month Trial

Start collecting automation ideas in minutes at **UiPath.com/AutomationHub**

Standard Plan

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- Each Automation Hub instance includes unlimited Automation Hub users
- Unlimited Task Capture use is also bundled





Additional Resources





Product webpage

Task Mining: <u>https://www.uipath.com/product/task-mining</u> Process Mining: <u>https://www.uipath.com/product/process-mining</u> Automation Hub: <u>https://www.uipath.com/product/automation-hub</u> Task Capture: <u>https://www.uipath.com/product/task-capture</u>



YouTube Demo Video

Task Mining: <u>https://www.youtube.com/watch?v=3ufF5z0fKRs&ab</u> Process Mining: <u>https://www.youtube.com/watch?v=476czZcxrQE</u> Automation Hub & Task Capture: <u>https://www.youtube.com/watch?v=Bijpv2O_Yj0&t=4s</u>



Documentation

Task Mining:<u>https://docs.uipath.com/task-mining</u> Process Mining: <u>https://docs.uipath.com/process-mining</u> Automation Hub: <u>https://docs.uipath.com/automation-hub</u> Task Capture: <u>https://docs.uipath.com/task-capture/</u>



Academy

'What's new in 21.4?' courses coming soon: https://academy.uipath.com





21.4 Partner Enablement Plan

https://www.uipath.com/21.4_technicaltraining_amer_emea

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