

# Apps, Activities and Integrations(TA) 20.10

Product Enablement Session



# Disclaimer

The following information is meant only for UiPath Partners

# Agenda

- 01** Data Service
- 02** IT Automation
- 03** Forms
- 04** Action Center
- 05** Apps
- 06** Contact Center
- 07** Tech Alliance – Workday, DocuSign, & Smartsheet



## Data Service

# Agenda

- 01** Introducing Data Service
- 02** Benefits
- 03** Key Differentiators
- 04** Target Customers
- 05** Demo and Use Case
- 06** Roadmap

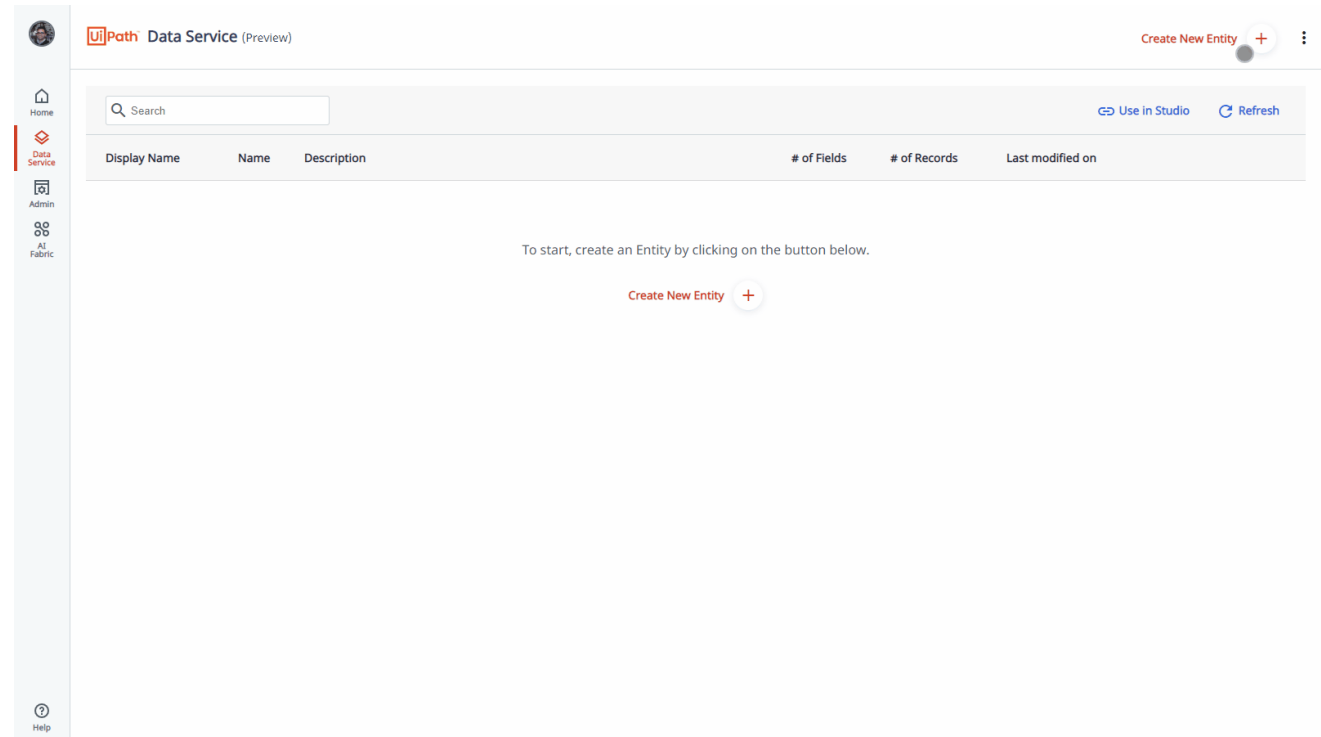
# Introducing UiPath Data Service

## Data management and storage simplified for your automation

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



Manage, deploy, and optimize automation at enterprise scale



# Marketing Message

## Automation at Scale

- ✓ Highly scalable data store
- ✓ Aggregate data from multiple legacy systems into a single store for subsequent processing
- ✓ Auto-scaled & dedicated instances, encrypted in transit & rest
- ✓ Provide customers and employees more contextualized and customized automation experience

## End-to-End Platform for Automation

- ✓ Integration with UiPath Suite of products – Studio, Apps, AI Fabric for easy data consumption
- ✓ Centralize business data within UiPath Platform
- ✓ Provide end-to-end data modeling, management, and storage for automation initiatives

## Rapid Time to Value

- ✓ Reduced time and effort to access and use data within the automation projects
- ✓ Easier drag and drop data modeling experience. No more long coding hours to create, manage and store data.
- ✓ Share data easily across UiPath products with the click of a button

# Who needs Data Service?

## Business



**Any enterprise** across all industries that empowers its developers and business users to model and store business data for automation



**Organizations** looking to eliminate data silos, control data and offer employees with seamless access to business data across UiPath products with enterprise-grade security and scalability



**Organizations** that has no system of records or need to find or create a data store

## People



**RPA developers** looking to model, store and persist data across different automations and the entire UiPath ecosystem



**Business users** who use and share transactional data with other users through their automations



**CoEs** who plan to provide data access to various RPA users with role-based permissions





Demo

# Key Features

- Create rich entities, with rich data types like text, number, yes/no, choice set, date/time, files, etc.
- Simple UX to model entities and quick access to data
- Fully integrated in Studio, import your entities as rich variable types
- Set of activities for accessing/manipulating data from Studio/Robot
- Out of box created by, modified by, created time and modified time fields for every entity
- Integrated in Automation Cloud, segregated by tenant boundary
- Rich permission management based on Modern Robots

# Use Case



**New data which is not stored anywhere else**



**Aggregate data from multiple systems before processing**

Unattended processes aggregate data in Data Service and then attended use cases work against this data



**Long running business processes that need to transfer data across multiple attended/unattended processes**

Just past around the record Id, retrieve the latest from Data Service and keep one copy of truth



**Just define the schema, import in Studio and work with rich .Net variables**

# 2021 Roadmap – Key Features

2020

2021

- General Availability
- File data type
- Choice Set data types
- Custom roles and entity level permissions
- Europe & North America regions

- Column level permissions
- Record level permissions
- Bulk update/insert/upsert support
- Integration with Apps

# Roadmap– Features beyond 21.4

- OpenAPI/Swagger support – Call from external code or apps
- Audit History – Schema actions
- Audit History – Data actions
- Virtual entities – Create entities from your existing data in CRM, ERP, SQL, etc.
- Many to Many relationships
- Parent-child relationships
- Auto-number – Auto incrementing number field
- Unique constraint – Set a field to have unique values in an entity
- Calculated fields – Allow basic string and numeric calculated fields, like “Name=First+Last”
- Make it available on-prem
- ALM/move schema changes between tenant



# IT Automation

# IT Automation, Objective and Strategy

IT Automation helps you **respond faster to IT requests** and incidents, increase efficiency to lower IT costs and improve your security posture.

UiPath delivers **IT automation activities and workflow templates** that allow you to easily automate a broader set of your core IT scenarios.

We empower enterprise RPA with out-of-the-box IT Automation capabilities

1. Seen from a holistic end-to-end process perspective, IT Automation capabilities are complementary to the RPA & BPM ones
2. existing workflows can be extended with new functionality, to also perform steps that were previously not possible
3. Core Areas of focus – Server Virtualization, Cloud Infrastructure and Services, User Management and Network & Security

# Target Customer Base

## IT Infra Service Providers

Companies offering IT Infrastructure and services require holistic automation platforms, with a high degree of integration and a solutions portfolio that covers all aspects of their business.

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## Datacenters

Datacentres need solutions that can cover their automation needs at scale: infrastructure provisioning, configuration, management, maintenance + updates, monitoring, disaster recovery, backup

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## Companies with medium / large Infra

Enterprise organizations require automation solutions that offer out-of-the-box :

- a. scalability,
  - b. high degree of integration
  - c. granular control
  - d. audit + reporting
- 

## Solution Providers (Integrators)

Consultancy companies and Integrators want to have in their portfolio diversified automation platforms / products, in order to provide their customers with solutions that best fits their needs

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## Empowering Businesses

Use the power of IT  
Automation to optimize your  
business

- low barrier to entry
- reduced setup time
- rapid ROI



## Seamless Integration

Integrates with your  
existing Systems &  
Applications

- no additional  
implementation costs
- blends into your existing  
partner ecosystem



## IT Process Automation

IT Infrastructure & Services  
provisioning, management,  
configuration capabilities

- higher productivity of IT teams
- increased agility: fast response  
to changes, requests
- cost savings

# What's New – Microsoft Hyper V

1. Activities for the **Microsoft Hyper-V** virtualized infrastructure.
2. Enables IT Departments to easily automate processes for on-demand management and maintenance of Hyper-V virtual machines.

## Benefit:

1. This package will help to easily automate actions like create virtual machines, power on/off virtual machines, configure robot in their (RPA) workflows.
2. Typical automation scenarios that will benefit from using these activities: green computing, robots provisioning, infrastructure management (provisioning of a new server from a template, reboot, power on/off VMs, VM checkpoint management, etc.)

# What's New – Microsoft System Center

1. Activities for **Microsoft System Center Orchestrator**.
2. This set of activities enables integration of IT automation created with System Center Orchestrator in holistic UiPath automation processes. The package offers activities for Runbooks, Jobs, and Events.

## **Benefit:**

1. Many customers have already invested money and time to build automation in their System Center Orchestrator. We empower these customers to use their existing automations and integrate them in RPA workflows as part of holistic UiPath processes. We offer activities for Runbooks, Jobs and Events.



Demo

# IT Automation Roadmap\*

## Next:

1. Google Cloud activities
2. Citrix Desktop Virtualisation activities
3. Citrix App Virtualization activities

## Near Term:

1. Azure Windows Virtual Desktop
2. Amazon Workspaces
3. VMware vRealize / SaltStack
4. VEEAM backup & recovery
5. Citrix Director

\*Can be subjected to Change



**Thank you!**



# Forms

# Forms Objective, Benefits and Target User

Attended automations require human input for processes to complete. To enable scenarios with human input needed for downstream processing **Forms was introduced**

## Business Benefits:

Provide a light presentation layer that enables RPA developers to build custom forms that will collect human input for robots to act on.

## Marketing Message:

Save time in building UIs, and enjoy the flexibility to develop custom forms from scratch. It's as easy as drag-and-drop to design forms using a WYSIWYG editor with no coding skills required.

## Target Users:

**End users** (such as contact center agents, knowledge workers, or business analysts): These are the people who will be interacting primarily with the process, and will have to enter data into the form fields. They execute processes either directly in the robot tray or trigger them through user events.

**RPA developers:** These are the people who are developing the form. RPA developers that build these forms need a WYSIWYG interface and shouldn't need to code.



# What's New – Forms Enhanced Capabilities (v1.1.7)

1. **Default Tab Support** - When creating a form containing multiple tabs, you can now select which tab you want to be opened by default when the form is loaded
2. **Load Spinner Indicator at Form level** - Previously local to the executed component, now spinner is visible at the form level.
3. **Non Editable File field** – you can only choose from the file system, cannot edit the field
4. **Local Image File Display Support** – now you can use image from the local file system to be displayed in forms
5. **Execute on Dropdown change** - You can now execute the Do block when a drop-down form component is changed dynamically.
6. **Cascading Dropdown** – capability of having dynamic and cascading dropdown now available in forms.
7. **PDF Document View Support** - We have now added support for displaying PDF files in the forms created with the Create Form activity.
8. **Advanced Logic/Advanced Validation Support** – dynamic and conditional validation/actions now possible within forms



Demo



**Thank you!**



## Action Center

# Agenda

**01** Action Center Overview

**02** Benefits

**03** Key Differentiators

**04** What's New?

**05** Target Customers

**06** Use Cases

**07** Demo

Automate more work from start to finish  
through seamless Human-Robot collaboration from a single platform



## Actions

- **Centralized inbox** accessible through web-based portal and UiPath Mobile App
- Exception, validation, escalation, and approval handling by user



## Processes

- Trigger processes through form-based input and file upload
- Track processes triggered by a user



## Process Monitoring

- Monitor the long running workflow from start to finish as a single job
- Consolidated view of the Robot logs

# UiPath Action Center Benefits



## Actions

- ✓ Easy exception and escalation management
- ✓ Web and mobile based access
- ✓ Seamless Robot-Human handoff
- ✓ Robots available for other automation jobs while humans take actions
- ✓ Rapid time to value



## Long Running Workflow

- ✓ Achieve high level of end-to-end business automation
- ✓ Wider range of processes can be automated
- ✓ Simplified compliance
- ✓ Intuitive and simple UI
- ✓ Centralized coordination through Orchestrator



## Process Monitoring

- ✓ Attain end-to-end visibility of business processes
- ✓ Identify and handle resource bottlenecks, process issues
- ✓ Improved decision making
- ✓ Critical Path identification
- ✓ Visibility across business silos

# Key UiPath Differentiators

## Automation at Scale

✓ Automate a **broader range of processes** across business units that span multiple days/weeks and **avoid process fragmentation**

✓ Automate advanced processes by **bringing humans into the loop** to provide the necessary input

✓ The **flexibility of deployment** (on-prem and cloud) allows customers to choose the deployment model that suits them best

## End-to-End Platform for Automation

✓ Automate from start to finish through seamless Human-Robot collaboration from the UiPath Platform

✓ Integrated with **Document Understanding** - Validation Station, **Process Mining** and **AI Fabric** to leverage the potential of the UiPath suite

✓ Provide end-to-end process visibility across business silos

✓ Easily **integrate with external BPM tools through Task APIs** to allow customers to leverage existing BPM investments

## Rapid Time to Value

✓ Faster onboarding of business users for engaging with UiPath Robot. Allows for **higher robot utilization**.

✓ Take **actions on the go** (from web or mobile app)

✓ Readily **available out of the box** interface for business user to trigger processes making back-office automation available to business users



# What's new?

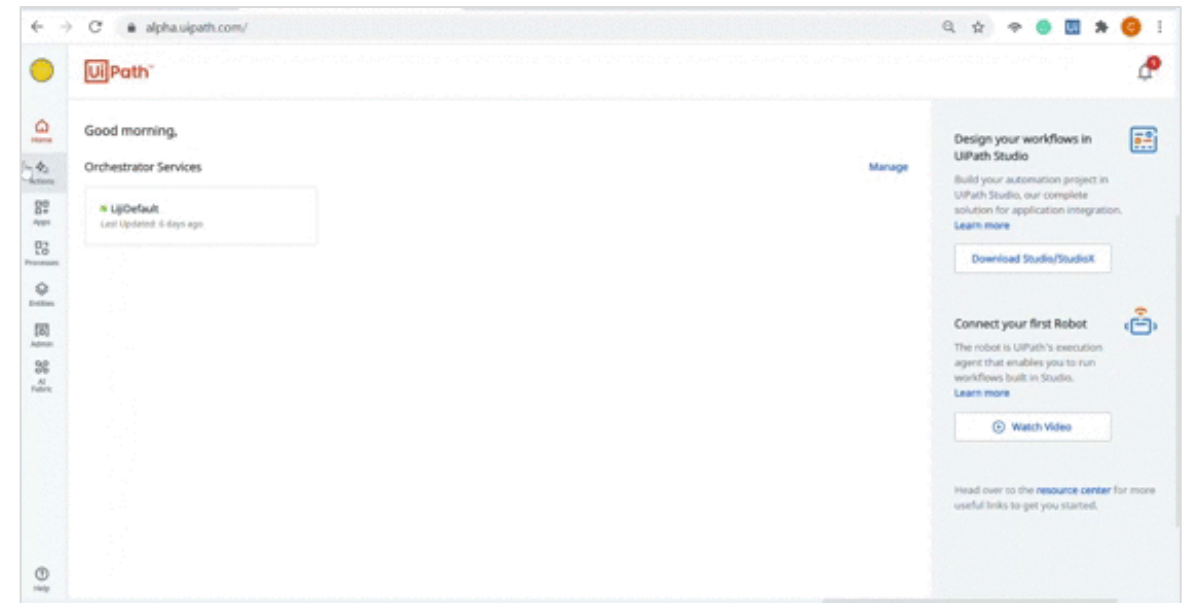
**Dedicated Actions App:** user interface tailored specifically for Business Users in Automation Cloud (on-prem by December)

## Actions Enhancements:

- **Modern Folder Support**
- **New action types** (DC and DV)
- **Action attachments**
- **Storage Bucket based images**
- **Cascading Dropdowns**

## Processes:

- Trigger unattended processes by providing the business inputs
- Auto generated form inputs (including file upload controls)
- **Track** processes triggered by a user



# Expanding our Platform to Support New Roles



**Subject Matter Experts**



**Citizen Developers**



**RPA Developers**



**Process Controllers**



**Business Users**



**Business Analysts**

# Large Scale Automation



## Agent Verification

**Scenarios**

Review customer documents against a checklist, get the missing documents and attach the necessary documents

**Processes**

New vendor onboarding after security approvals  
Customer onboarding, Account activation, Loan forgiveness  
Travel and expense audit compliance

**Industries**

Banking  
Telecom  
Government and Public Sector  
Insurance  
Healthcare



## Invoice Processing Approval

Exception validation and approval for bulk invoice processing

Invoice processing  
GL coding in invoices  
Order management  
Vendor management

Finance  
Accounting  
Cross industry



## Improve ML model efficiency

Human input to re-train ML models to improve the accuracy of the prediction

All Document Understanding scenarios with receipts, invoices, form extraction, AI Fabric and Customer ML models

Banking  
Telecom  
Healthcare  
Service industry

# Roadmap

## 2020 Roadmap

### Key Priorities:

- Actions Auditing and Reporting
- Business Metrics – SLA
- Rule/Config-based Auto Assignments
- Enhance developer experience
- Custom tags and dynamic filtering of Actions

## Action Center Makeover

The screenshot displays the UiPath Action Center interface. On the left is a sidebar with navigation icons for Home, Actions, Processes, Admin, and AI Fabric. The main content area is titled 'Actions' and shows a list of actions under the 'Pending' tab. Each action row includes a description, a task name, and a status badge (Critical, High, or Medium). Below the actions list is a 'Recent Processes' section with four cards: 'UpdateSAP', 'Sales Quote', 'Relocation Expenses', and another 'Relocation Expenses' card, each showing a 'Last Published' time. On the right side of the interface, there are two promotional sections: 'Design your workflows in UiPath Studio' with a 'Download Studio/StudioX' button, and 'Connect your first Robot' with a 'Watch Video' button. At the bottom right, there is a 'Total Runs' section.

Actions		
<a href="#">Pending</a> <a href="#">Unassigned</a> <a href="#">View All</a>		
Validate Q3 Claim Data	FormTask	Critical
Test_Extraction_0	DocumentValidationTask	High
Test_Extraction_0	DocumentValidationTask	High
Test DataGrid with hyperlinks	FormTask	Medium
Rendering test - Html, Email, Phone, Date, Day, Time, Currency, Survey	FormTask	Medium

Recent Processes	
<a href="#">View All</a>	
<b>UpdateSAP</b> No description Last Published: 21 hours ago	<b>Sales Quote</b> Sales quote dispatch processing with country specific approvals Last Published: 21 hours ago
<b>Relocation Expenses</b> Relocation expense processing for high value invoices Last Published: 22 hours ago	<b>Relocation Expenses</b> Relocation expense processing based on approvals Last Published: 4 days ago



Demo





# Thank you!



**UiPath™** Apps

# Agenda

**01** UiPath Apps - Introduction

**02** Apps and RPA Life Cycle

**03** Who is it for ?

**04** Marketing Message

**05** How does it work? (Demo)

**06** Use Cases

**07** Roadmap



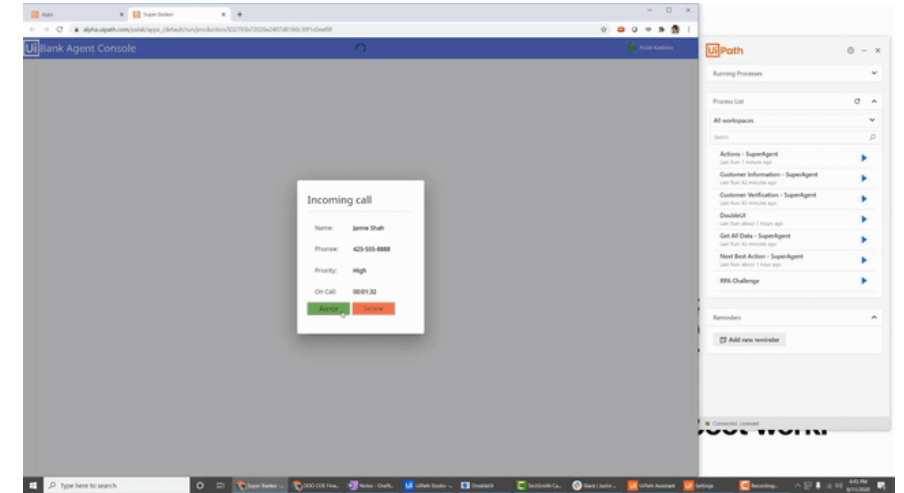
# UiPath Apps | Introduction

## The industry's first automation powered low-code apps

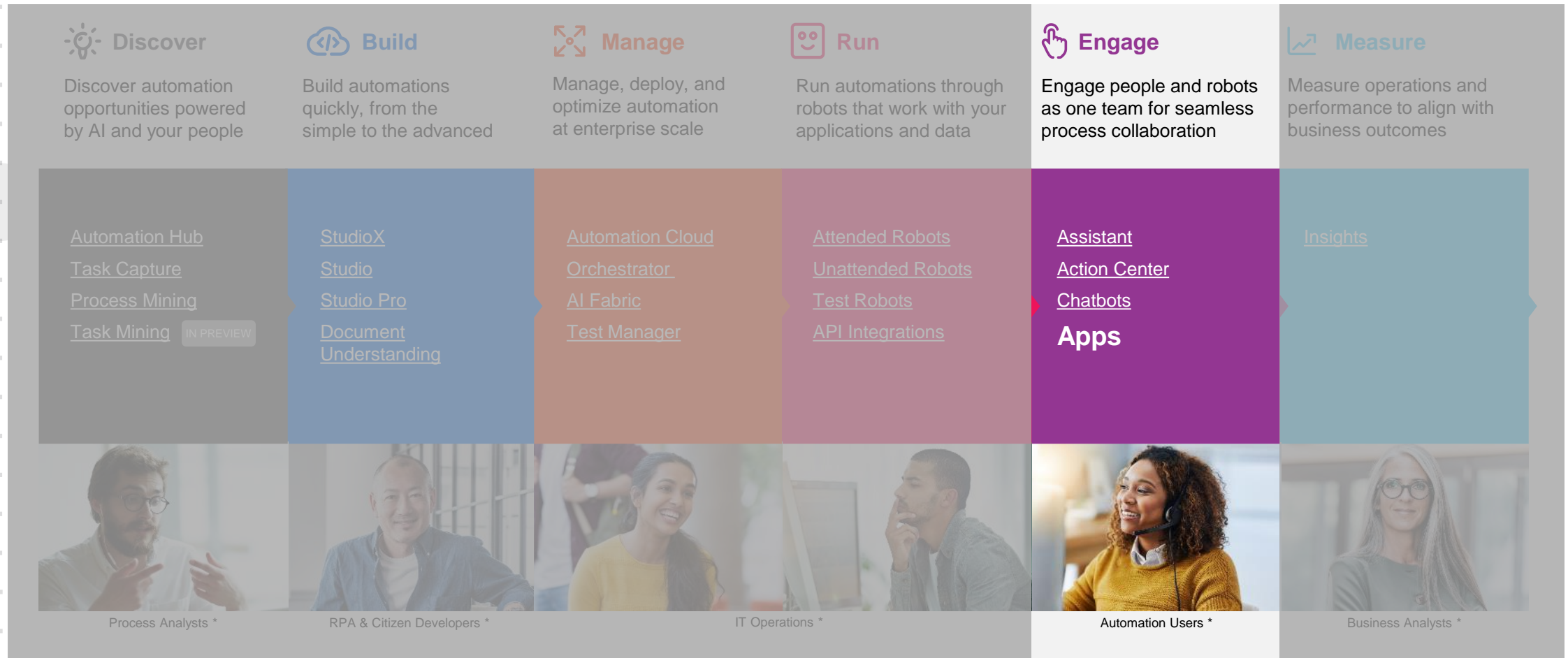
Apps is a low-code web-based, drag and drop business application that enables you to build and deploy enterprise grade applications that deliver rich and engaging end-user experiences.

### What UiPath Apps bring on table:

- Design **visually appealing professional apps** using a web interface, drag and drop controls
- **Lower cost and complexity** for app development
- Apps that **connect to your data through RPA**. On Cloud, on-prem, legacy with no APIs
- **Capable of building everything** from enterprise grade application to simple forms that help you save time
- **1 Click deployment** – go live sooner, share apps easily with business users
- **Hybrid model support** - Apps reside in cloud and the called processes reside on on-prem instance of orchestrator.



## Where does Apps fit in the automation lifecycle?



\* Example roles

# Who needs Apps?

## Business

- ✓ **Any enterprise** across all industries that plans to empower its employees with automation
- ✓ **Organizations** looking to democratize RPA through easier and delightful interaction with automations

- ✓ **CoEs** who plan to operationalize RPA through organization wide automation deployment

## People

- ✓ **Contact Center Agents** trying to solve customer issues without having to learn various backend processes/applications
- ✓ **Business users** who want a single interface with their data to work from and minimize the time to

# Key UiPath Differentiators

## Accelerate Growth and Operational Efficiency

- ✓ **Wider Scale adoption of Automation:** Democratize RPA with self service apps
- ✓ **Faster Development:** Rapidly deliver apps for your business needs
- ✓ **Improved RPA usage:** Delightful experience leading to better engagement with automation
- ✓ **Faster ROI:** From idea conception to app deployment in no time

## Improve Employee Happiness

- ✓ **Rich User Experience:** Highly interactive web/mobile experience with drag and drop features and controls
- ✓ **Increased Productivity:** Seamlessly integrate with any business application like ERP, CRM, etc including legacy apps
- ✓ **Employee satisfaction:** simplify work with efficient apps and eliminate steep learning curve

## Improve Customer Experience

**Customer Satisfaction:** offer agility and respond and adapt quickly to changing customer needs.




















# How does it work? (Demo)



## Problem statement

In this demo we tried to build a webapp using UiPath Apps studio for a tele contact centre employee. Consolidating the retrieval , updating and resolution of customer query and details utilizing UiPath Robots and Orchestrator, via UiPath Apps

# 2021 Roadmap

Complete Apps Platform	Integration with UiPath Suite *	Mobile
<ul style="list-style-type: none"><li> Design-time experience for low-code apps (expressions, functions, lookups)</li><li> Compliance &amp; DevOps</li><li> Customer Feedback</li><li> On-premise support</li></ul>	<ul style="list-style-type: none"><li> App integration with Data Service or a native data store</li></ul>	<ul style="list-style-type: none"><li> Apps work on mobile devices</li></ul>
<ul style="list-style-type: none"><li> Moving an app between accounts</li><li> Runtime experience for low-code canvas-based apps</li><li> App connectivity to RPA (Studio Activities)</li><li> Design-time collaboration between multiple users</li><li> Controls for basic and complex data</li><li> App solution packaging and deployment</li></ul>	<ul style="list-style-type: none"><li> Automation Cloud Admin and Audit for apps</li><li> Apps appear in UiPath Assistant</li><li> Analytics integration</li><li> Orchestrator integration</li><li> App Ideas in Automation Hub</li><li> Marketplace integration</li><li> Action center integration</li></ul>	

**Note :** Subjected to change as per prioritization. For most recent update please refer the product board

# Contact Center

# Unlock Contact Center

www.BANDICAM.COM

The screenshot shows the UiPath Apps interface. The main area displays two published applications: "Super Banker" and "Telco Agent". Both are owned by Palak Kadakia. The "Super Banker" application was last published on 11/08/20 and is at version 13. The "Telco Agent" application was last published on 11/08/20 and is at version 1. A sidebar on the right shows a list of running processes, including "Actions - SuperAgent", "Customer Information - SuperAgent", "Customer Verification - SuperAgent", "DoubleUI", "Get All Data - SuperAgent", "Next Best Action - SuperAgent", and "RPA Challenge". Below the process list is a "Reminders" section with an "Add new reminder" button. The bottom of the sidebar indicates the user is "Connected, Licensed".

UiPath Apps

Group by: Permissions

Owner

**Super Banker**  
Owner: Palak Kadakia  
Last published: 11/08/20  
Version: 13  
Published

**Telco Agent**  
Owner: Palak Kadakia  
Last published: 11/08/20  
Version: 1  
Published

Running Processes

Process List

All workspaces

Search

Actions - SuperAgent  
Last Run: less than a minute ago

Customer Information - SuperAgent  
Last Run: 41 minutes ago

Customer Verification - SuperAgent  
Last Run: 42 minutes ago

DoubleUI  
Last Run: about 5 hours ago

Get All Data - SuperAgent  
Last Run: 41 minutes ago

Next Best Action - SuperAgent  
Last Run: about 1 hour ago

RPA Challenge

Reminders

Add new reminder

Connected, Licensed

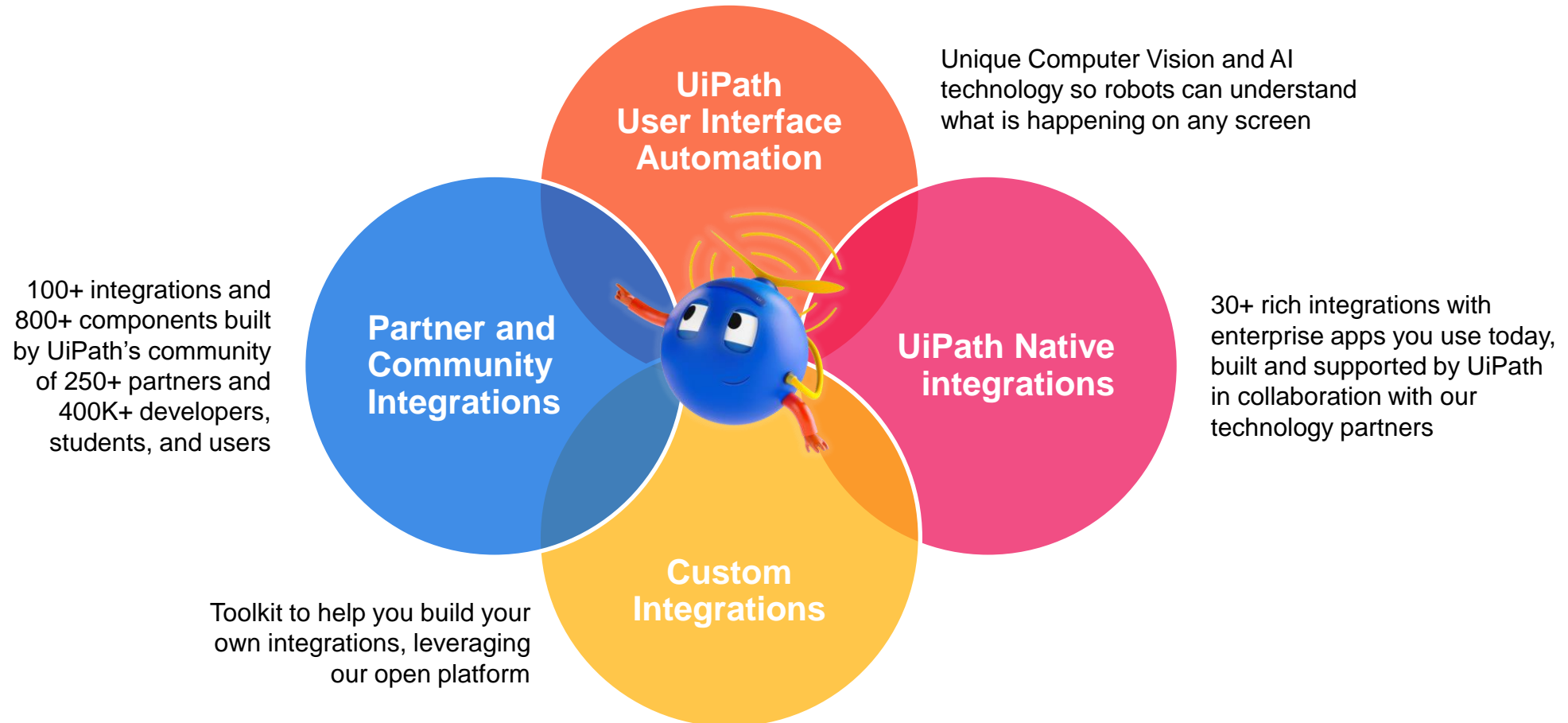


# Tech Alliance/ Integrations:

Workday  
DocuSign  
Smartsheet

# UiPath provides flexibility so you can **automate more**

**Use any (or all) of these capabilities to build automations that flex to your needs**



# Automate more – and faster – with UiPath native integrations



## More automation across tools you use

Build synergies across tools and teams by automating end-to-end processes across apps



30+ API-based integrations with applications you use today



Built, supported, and maintained by UiPath



Focus on depth of integrations – not just basic A-to-B connections



## Trusted by tech providers

UiPath native integrations are backed or certified by technology providers



Follow tech provider best practices and security standards



Collaboration with tech providers on development



Open and flexible ecosystem



## Faster time to value

See rapid results with easy deployment and robust governance capabilities.



Drag and drop automation design



Tools for IT teams to govern enterprise automation projects



Robust support offerings

# We Work With What Customers Use and Love



## Document Understanding



## Conversational Understanding



## Process Understanding



## Specialized ML



## Test Automation



## Security



## Infrastructure & Architecture



## Intelligent BPM



## Content Mngt & Collaboration



## Industries & Others



Over 300 technology alliances partnerships across the ecosystem



**Workday**

# Agenda

**01** Workday Integration Overview

**02** Marketing Message

**03** Target Customers

**04** What's New ?

**05** Demo

# Extend the full value of Workday with UiPath RPA



**Workday** offers cloud-based enterprise-level software solutions for financial management, human resources, and planning, that enable customers to change effectively.



**UiPath** is the global leader in the automation space, providing intelligent software robots to automate business processes that drive enterprise value.

**Together, UiPath and Workday help you improve efficiency, increase accuracy, and deliver better employee and customer experiences through smoother HR, HR IT, and Finance processes.**

# Marketing Message

## Improved Employee Experience

### **Extend the value of Workday to your organization by automating complex HR IT workflows**

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Streamline complex, high-volume HR processes, incl. onboarding, offboarding, and employee assessments, by creating automations across Workday and other relevant enterprise applications.

## Increased Finance Productivity

### **Improve the efficiency and accuracy of your finance operations with automations**

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UiPath's dynamic integration with Workday enable customers to easily automate common finance & accounting processes in Workday, so you can achieve your growth objectives.

## Accelerate ROI

### **Deploy and manage automations with ease, without the need of costly custom developments**

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UiPath makes it easy to create world-class automations across Workday applications, incl. HCM, Business Planning, Financial Management or Analytics, which significantly reduces implementation time and removes the need for bespoke integrations.



# UiPath brings benefits to all Workday users



## Business Leaders

Improvements in operational efficiency, accuracy and resolution time, drives better employee experiences and higher business outcomes for C-suite leaders.



## HR, Finance, IT Teams

UiPath Robots automate the flow of information in and out of Workday and across different systems – which means HR Ops, Finance or IT and other teams no longer do this work manually.



## Workday Experts

Admins and other Workday experts can easily manage automations and retrieve Workday information, used in complex workflows, without the need for bespoke development.

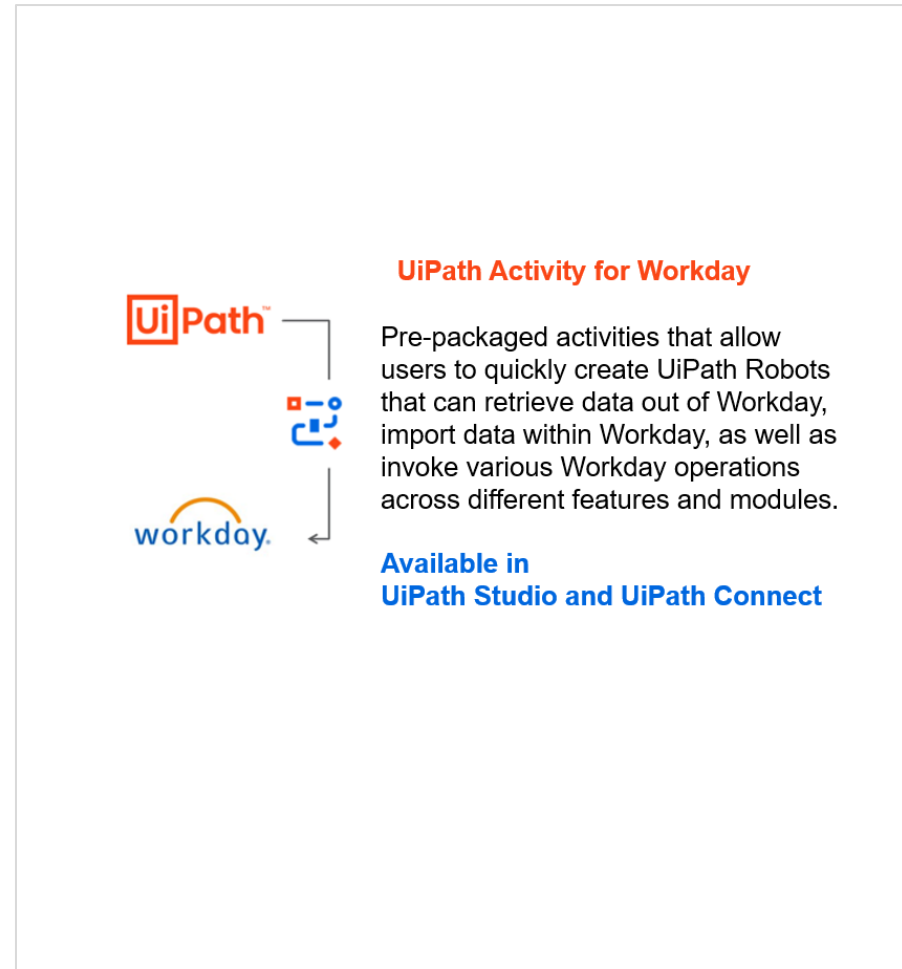
Extend the value of your Workday across your organization with UiPath RPA

## How do we work together?

- UiPath is the only RPA vendor part of the Workday Software Partner Program, as Access Partner.

## Key Integrations

- Native integration between the UiPath Enterprise RPA Platform and Workday solutions enables users to retrieve data from Workday and to easily design automations that work with Workday products.
- **Out-of-the-box UiPath activities for Workday** that follow functional, interoperability and security guidelines of Workday.
- The package includes features, such as:
  - Get report, to ease data extraction from Workday
  - Launch Workday EIB, to pull data in Workday and automate changes
  - Invoke any Workday Operations, from add, edit, change, put, import, update, get to specific HR and Finance processes.



## Use Cases & Resources

### Customer Story:

**Workday reporting automation:** UiPath robot runs Workday HR report of current employees monthly, extracts the data and updates 3<sup>rd</sup> party payroll system so payments can be triggered to the employees.



### Customer Story:

**Test Automation on Workday:** Ease of building test cases to test the functionalities of your Workday environment e.g. logging in with different user permission, testing how to terminate an employee in Workday



### Demo Video:

[Testing Automation on Workday with UiPath Test Suite and Integrations and Workday](#)

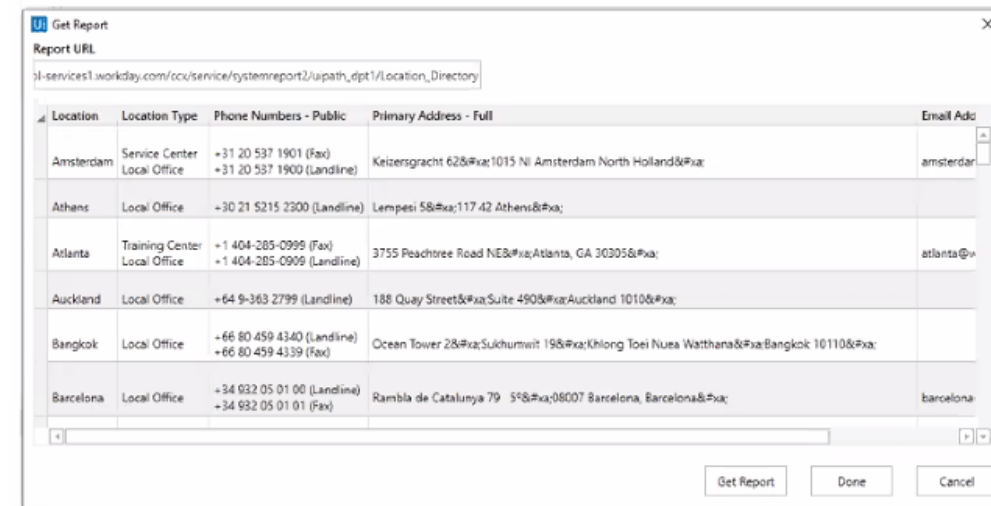
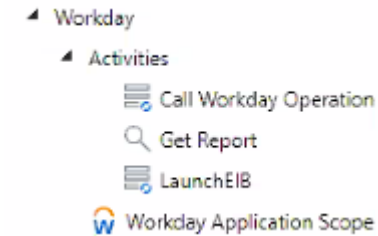


# UiPath Activity for Workday

Pre-packaged set of activities, available on UiPath Studio, that connects the UiPath Enterprise RPA Platform to Workday using Workday's publicly-supported APIs.

**In 20.6 we have added the Invoke Workday operations activity.**

Type	Activity	Details
Connection & Authorization	Workday Application Scope	Enables the UiPath Robot to get access to Workday
Workday Object	Get Workday Report Launch EIB	UiPath Robots can retrieve data from Workday system, as well as to trigger changes within Workday through launch EIB functionality.
	Invoke Workday Operation	Enables the UiPath Robot to invoke specific Workday operations needed to drive automations.



Demo!





**DocuSign**

# Agenda

**01** DocuSign Partnership Overview

**02** Marketing Message

**03** Target Customers

**04** What's DocuSign Integration ?

**05** Demo

The DocuSign logo, consisting of the word "DocuSign" in a bold, black, sans-serif font, with a registered trademark symbol (®) to the upper right of the "n".

**DocuSign®**

**DocuSign, Inc.** allows organizations to manage electronic agreements. DocuSign offers a way to sign electronically on different devices.

The UiPath logo, featuring the word "UiPath" in a bold, orange, sans-serif font, with a small trademark symbol (™) to the upper right of the "h". The "Ui" is enclosed in a square frame.

**UiPath™**

**UiPath** is the global leader in the automation space, providing intelligent software robots to automate business processes that drive enterprise value.

**Digital signature automation just got easier with UiPath's DocuSign Activity Pack.**

# Marketing Message

**Add digital signature capabilities**

**Don't let your document work pile up waiting for digital signature--automate it**

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- UiPath Robots can use DocuSign to help you prepare documents for signature, send documents out for signature, and invoke any DocuSign eSignature operation.
- UiPath Robots can use DocuSign to help you create, update, and send envelopes, as well as create lists of data.

**Build Greater Trust**

**Reduce human errors on the most important documents that requires signatures**

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our Robots do not get tired, bored, or have a bad day.

**Make it faster with low cost**

**Speed up the boring, but important stuff, while reducing costly development or workforce**

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UiPath Robots can instantly trigger your digital signature work without waiting in line for human availability or hiring and training new admins or IT staff.

*Organization:* Existing DocuSign Customers

*Role:* C-Level, Chief Legal Officer or General Counsel; CIO



# UiPath + DocuSign

Digital signature automation just got easier with UiPath's DocuSign Activity Pack

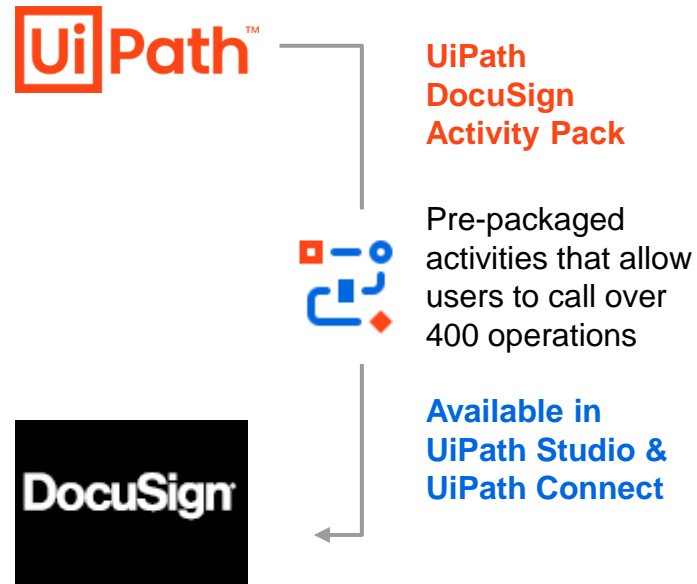
## How do we work together?

- UiPath is an ISV partner with the world's leading digital signature platform, DocuSign. We have created a deep API integration with major DocuSign components. Our integration is available in Studio, and in the [UiPath Connect Marketplace](#).

## Key Integrations

- UiPath Activity for DocuSign connects the UiPath enterprise platform to DocuSign's eSignature API
- Call over 400 distinct operations
- Create, update, and send Envelopes within a UiPath Process
- Work with Envelope List activities, such as List Attachments, List Customer Fields
- Enable users to Create or Get Bulk Send Lists
- Automate with DocuSign Templates, such as List Templates

## Automate digital signatures with UiPath & DocuSign



## Use Cases & Resources

### Customer Story:



**HR:** UiPath Robots work with Workday and DocuSign to manage the end-to-end employee signature life cycle from offer letter signature, to onboarding signature approvals, performance approvals, to offboarding document signature.



**NDA Signature:** DocuSign Activity Pack enables multi-national sales teams to create the right NDA, submit it to the designated legal and approval managers, and ensure timely signature completion. UiPath Robots also validate and perform regular signature audits for regulatory compliance.



**Multi-Signature Blocks:** Robots ensure that the right signature is applied from multiple departments and contacts. If there are delays or non-approved signers, Robots send alerts and find alternative routes for signature approval.



Demo!



**Smartsheet**

# Agenda

- 01** Smartsheet Partnership Overview
- 02** Marketing Message
- 03** Target Customers
- 04** What's Smartsheet Integration ?
- 05** Demo



The **Smartsheet platform** provides solutions designed to improve team collaboration including workflow automation, project dashboards, report generation, and resource management.



**UiPath** is the global leader in the automation space, providing intelligent software robots to automate business processes that drive enterprise value.

**The UiPath integration with Smartsheet helps you streamline and speed up processes and reduce human errors when managing project timelines, documents, calendars, tasks and sheets while extending the value of Smartsheet across your entire software ecosystem.**

# Marketing Message

## Streamline Processes

### **Project management, budget, sales, procurement, content management and many more**

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The UiPath Activities for Smartsheet is designed to address common customer use cases and pain points, so it is easy for you to design automations in and around Smartsheet without writing code.

## Reduce Human Errors

### **Reduce Human Errors**

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Automate the management of information and swivel chair operations between Smartsheet and other systems thereby eliminating potential human errors

## Security and Interoperability

### **Ensure Security and Interoperability**

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The UiPath integration with Smartsheet complies with Smartsheet security policies, practices, and governance standards, as well as with performance requirements related to interoperability and integration architecture.

## Extend the value of Smartsheet across your organization with UiPath Robotic Process Automation

### Key Integrations

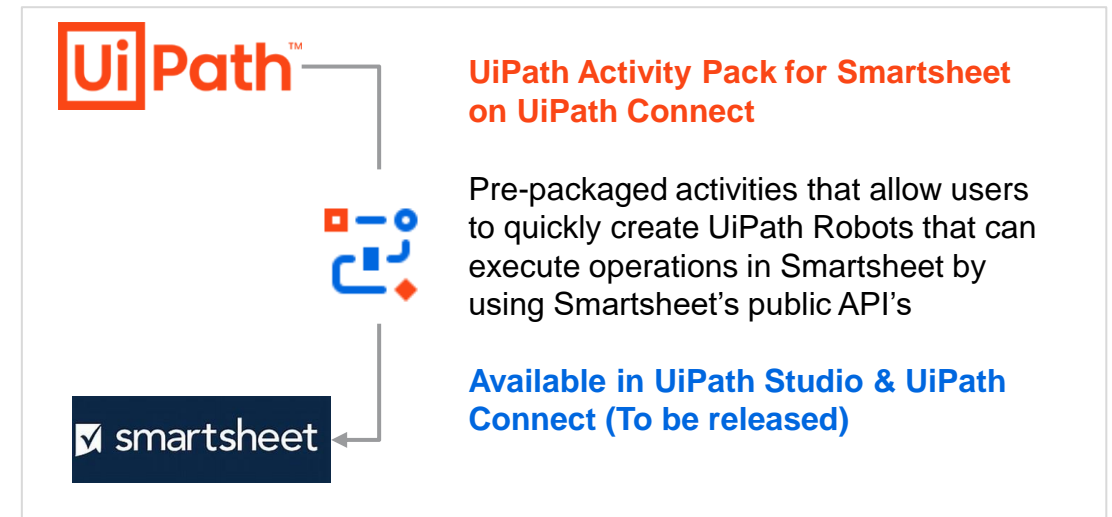
- Integration between the UiPath Enterprise RPA Platform and Smartsheet enables users to read, write and create data in Smartsheet and easily design automations that work with Smartsheet projects, reports and sheets.
- Out-of-the-box UiPath activities for Smartsheet** that follow functional, interoperability and security guidelines of Smartsheet

#### Use Cases:

**Inventory Management** - A robot checks the available quantities of inventory in a Smartsheet before processing an order. Once the order is processed the robot updates the available quantities in the inventory Smartsheet.

**Lease Management** – A new lease opportunity is created in Salesforce. A robot creates the new lease entry in the Smartsheet with the information from Salesforce. The robot can also check for updates to the Salesforce opportunities and update Smartsheet accordingly.

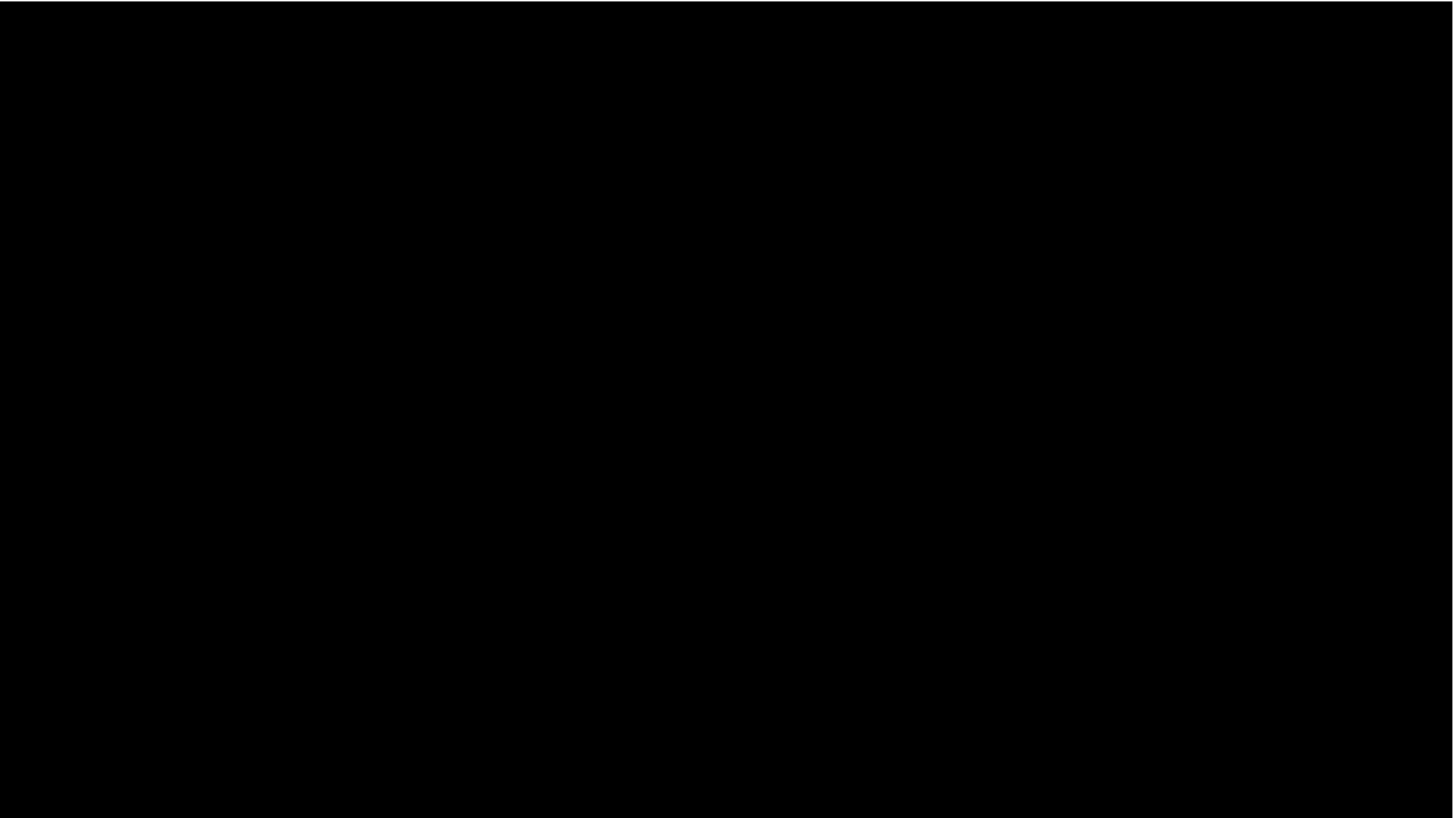
**Project Management** - A robot gathers updates and information in systems such as Jira and SharePoint and then updates deadlines, statuses of tasks or projects in a Smartsheet project. Then posts reminders in external systems like Slack.



**Organization:** Existing Smartsheet customers.

**Role:** LoB Decision-Makers, C-level, typically CHRO or CFO and Finance Ops

# Demo





# 2020 Integration **Activities Roadmap**



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# Thank you!