

Accelerate your Digital Transformation

Optimize. Automate. Succeed.



UBIQUITY



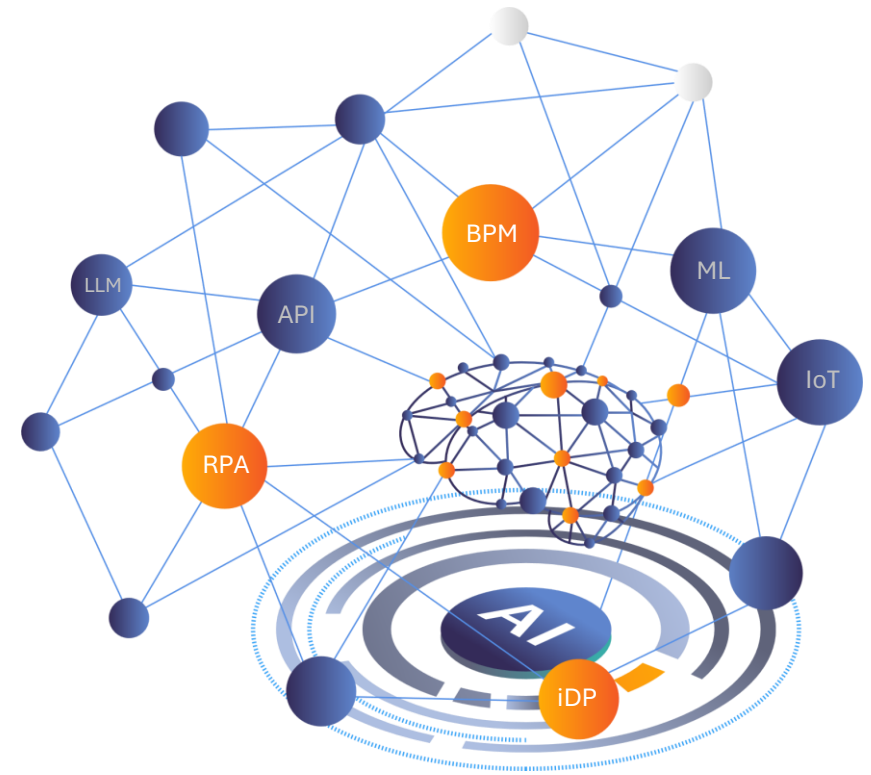
B2Digital

www.ubiquity.pt | www.b2digital.pt

Turning Vision into Digital Transformation

At Ubiquity Technology, we help businesses unlock the full potential of technology, optimizing systems and streamlining operations to fuel growth and efficiency.

Our team blends expertise with innovation to design IT strategies that enhance automation, simplify processes, and accelerate digital evolution. Whether optimizing existing infrastructures or implementing cutting-edge solutions, we deliver seamless, future-ready transformations tailored to your business needs.



Tailored Solutions for your Business Success

AI Agents & Digital Workforce

Automate repetitive tasks and enhance customer interactions with intelligent digital assistants that work 24/7.

Business Process Optimization

Streamline workflows, eliminate inefficiencies, and ensure seamless collaboration across departments.

Smart Document Processing

Extract, classify, and process information from documents effortlessly, reducing manual work and boosting accuracy.

Process Intelligence & Automation

Gain insights into your operations, identify bottlenecks, and implement intelligent automation for maximum efficiency.

IT Operations & Managed Services

Keep your systems running smoothly with proactive IT management, ensuring security, scalability, and high performance.

IT Outsourcing & Upskilling

Scale your business with expert IT professionals and equip your team with the knowledge to maximize digital transformation and automation.

The Ideal Partner in your Digital Transformation Process



Extensive Experience in Hyper-Automation

Extensive experience in successfully implementing automation projects across multiple sectors.



Consolidated Operational Structure

A global view of the solution, governance, operation (methodologies and best practices), infrastructure, and support that enables clients to scale processes sustainably, with progressive autonomy and control.



Strong Focus on R&D

Active participation in Research and Development (R&D) projects, establishing a close connection with UiPath Product Management, and encouraging and promoting the application of innovative cognitive technologies.



Integration and Strategy

We work with various innovative technologies, providing a holistic and integrated approach. Additionally, we offer consultancy and strategic support to our clients, ensuring robust solutions aligned with their business objectives.

RPA Specialized and Certified Team



A USN Partner *“has been rigorously vetted to join an elite group of best-of-breed partners accredited with advanced delivery skills and demonstrated success in real-world customer projects”*.



Besides being a UiPath USN partner, we consistently engage in training and R&D initiatives, earning us certifications as **RPA Developers, Business Analysts, RPA Architects, and Infrastructure Engineers**.



Multiple Customers in Diverse Industries



The Unique Benefits of Hyperautomation



Works Like a Human Does

Can take on a wide number of tasks and processes across your enterprise—reliably and without application changes.



Fastest Time to Value

Accelerated ROI and business results. 88% of UiPath RPA deployments finish in 6 months or less.



Accessible to All

Allows an entire organization to build and deploy automation, from non-technical to expert users.



Low Total Cost of Ownership

The centralized management, measurement, governance, and security you demand.

Our Methodology for Process Improvement



Assessment and Discovery

We begin by understanding your business processes, challenges, and goals. With interviews and data analysis, we identify key areas where automation can add value. We then tailor a solution that fits seamlessly with your needs.



Design and Planning

Based on the insights gathered, we design a customized automation strategy. This includes defining the scope, selecting the right technologies, and creating a detailed roadmap for implementation.



Implementation and Integration

Our team develops, deploys, and integrates the automation solution, ensuring seamless execution through agile methodologies and rigorous testing for optimal performance.



Monitoring and Continuous Improvement

After implementation, we monitor the automation system's performance, providing ongoing support and maintenance while refining processes to ensure long-term efficiency and adaptability.

Our BPMN Solution - HyperflowX

HyperFlowX is a powerful low-code Business Process Management (BPM) platform designed to help organizations streamline and automate their workflows faster and more efficiently.

Built for agility, it empowers business and technical teams to design, deploy, and optimize processes without heavy IT dependency.

HyperflowX is architected for adaptability, supporting fully tailored implementations. The platform is available under white-label licensing, empowering partners to rebrand and embed it seamlessly within their own digital ecosystems.



Why HyperflowX?



Scalable Solution, built on industry standards

Open solution, based on standards for greater interoperability and future-proof integration.



No Licensing Costs and Unlimited Users and Processes

Focus on growing your business while empowering your entire team, no matter its size.



Automatic Document Creation and Archive

Generate, store, and retrieve documents seamlessly — ensuring compliance, traceability, and time savings.



Traceability and Auditing

Tailor processes to your exact business needs and track performance and KPIs for smarter decisions.



Security Compliance

Meets CNCS requirements and RCM 41/2018 & RNID guidelines.



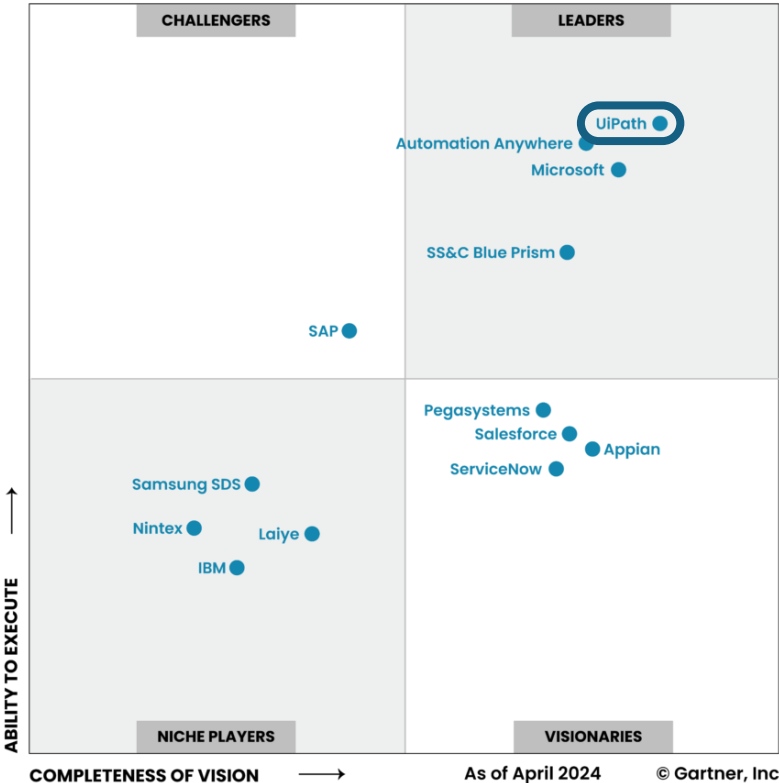
Microservices Architecture

Enables modular development and scalable deployments.

Partnering with UiPath Since 2016

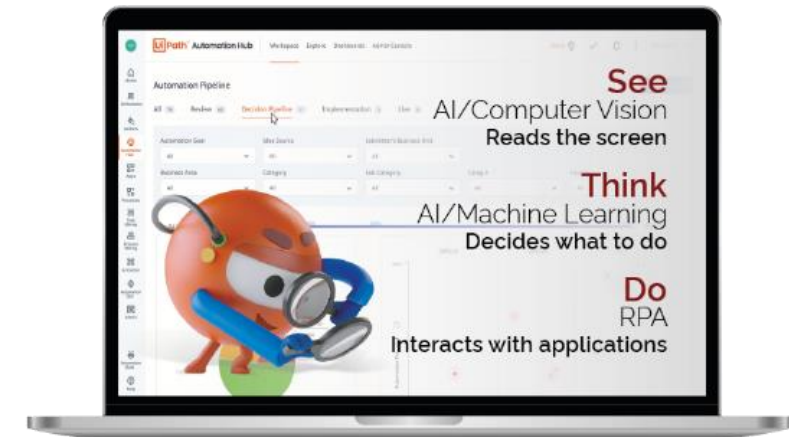


Gartner Magic Quadrant for Robotic Process Automation 2024



RPA: Unlock Significant Gains in Efficiency and Productivity

- ✓ Improved speed of response delivering shorter time to value.
- ✓ Resilience, as employees can make better decisions.
- ✓ Reduced repetitive tasks enabling to shift employees to strategic work.
- ✓ Increased throughput without hiring more headcount.
- ✓ Compliance and reduced errors.
- ✓ Improved customer satisfaction.



Automation Layer



RPA: Unlock Significant Gains in Efficiency and Productivity

240 hours per year



1 hour per day.
20 hours per month.

Estimated time savings by
providing a
digital assistant to **one**
employee.

+3.6M hours per year



Estimated time savings by
providing a
digital assistant to **15k**
employees.

The UiPath Business Automation Platform

UiPath Certified
PROFESSIONAL SERVICES



Discover

Continuously uncover opportunities for process and task improvements helping you identify the highest ROI areas



Automate

Get more done with a digital workforce that seamlessly collaborates with your people and automates work via UI and API, powered with native integrated AI



Operate

An enterprise-grade foundation to run and optimize a mission critical automation program at high scale

**Your
Processes**

Your Applications

Systems of record – ERP, CRM, HCM | Communications and Collaboration | Personal Productivity

**Your
People**








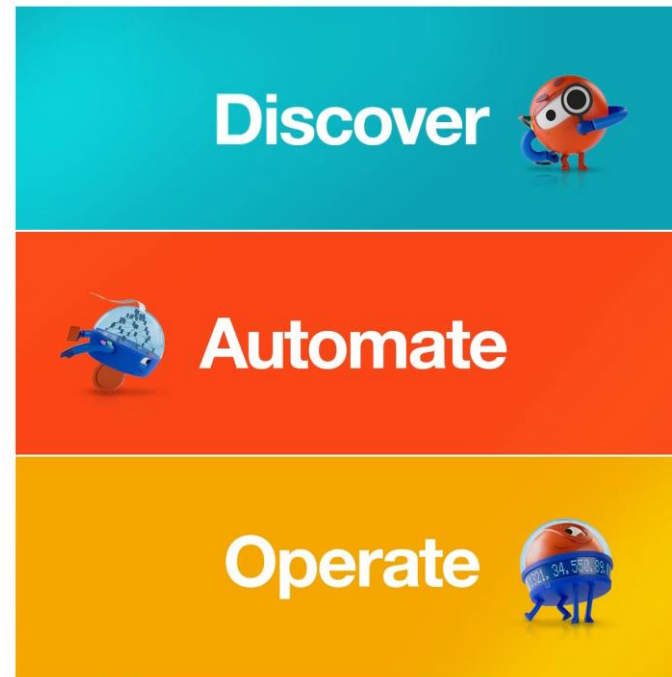
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The UiPath Platform Delivers AI at Work




UiPath Certified
PROFESSIONAL SERVICES

CONTEXT

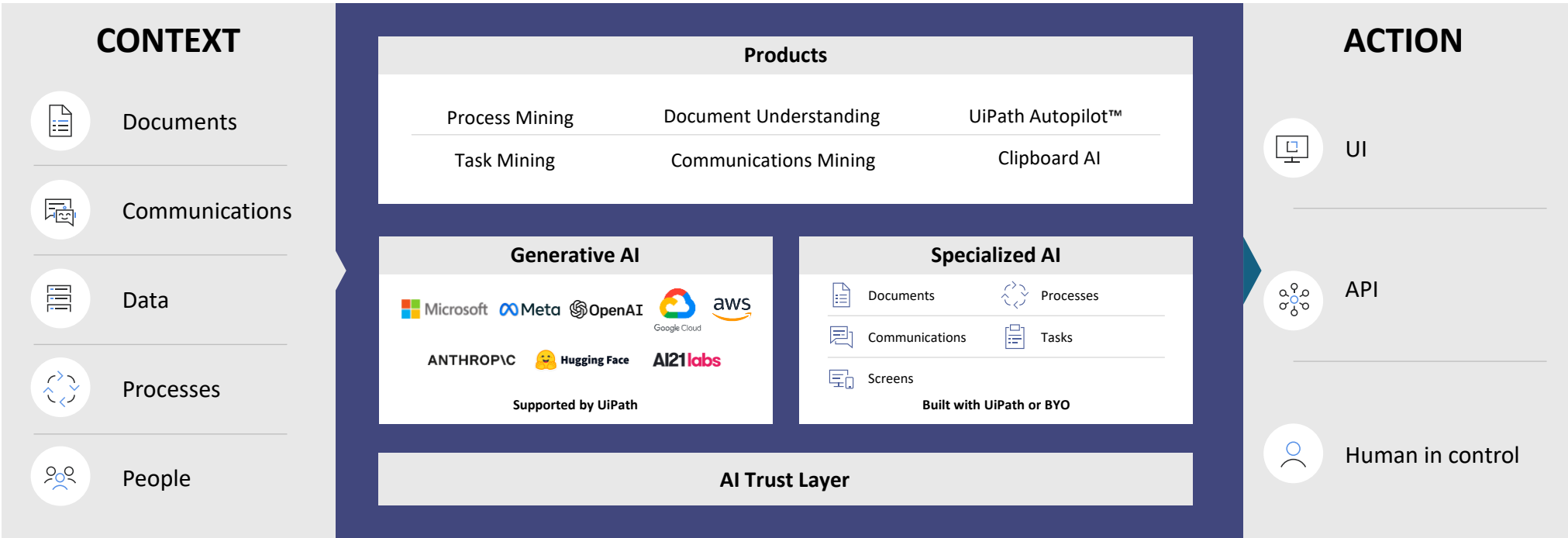
-  Documents
-  Communications
-  Data
-  Processes
-  People



ACTION

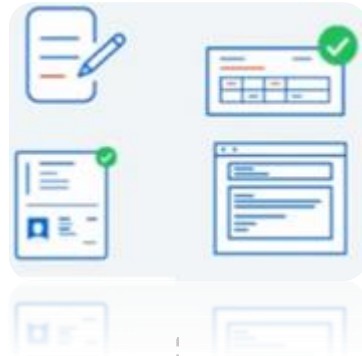
-  UI
-  API
-  Human in control

Powered by Generative AI and Specialized AI

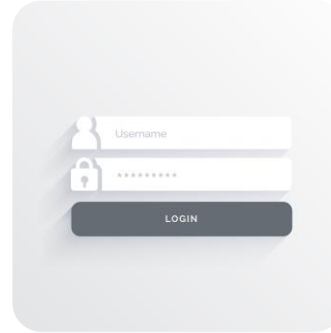


How does RPA works?

Performs calculations and logical tests, fills out forms, collects data from web pages, and much more.



Enters applications, triggers, and responds to actions.

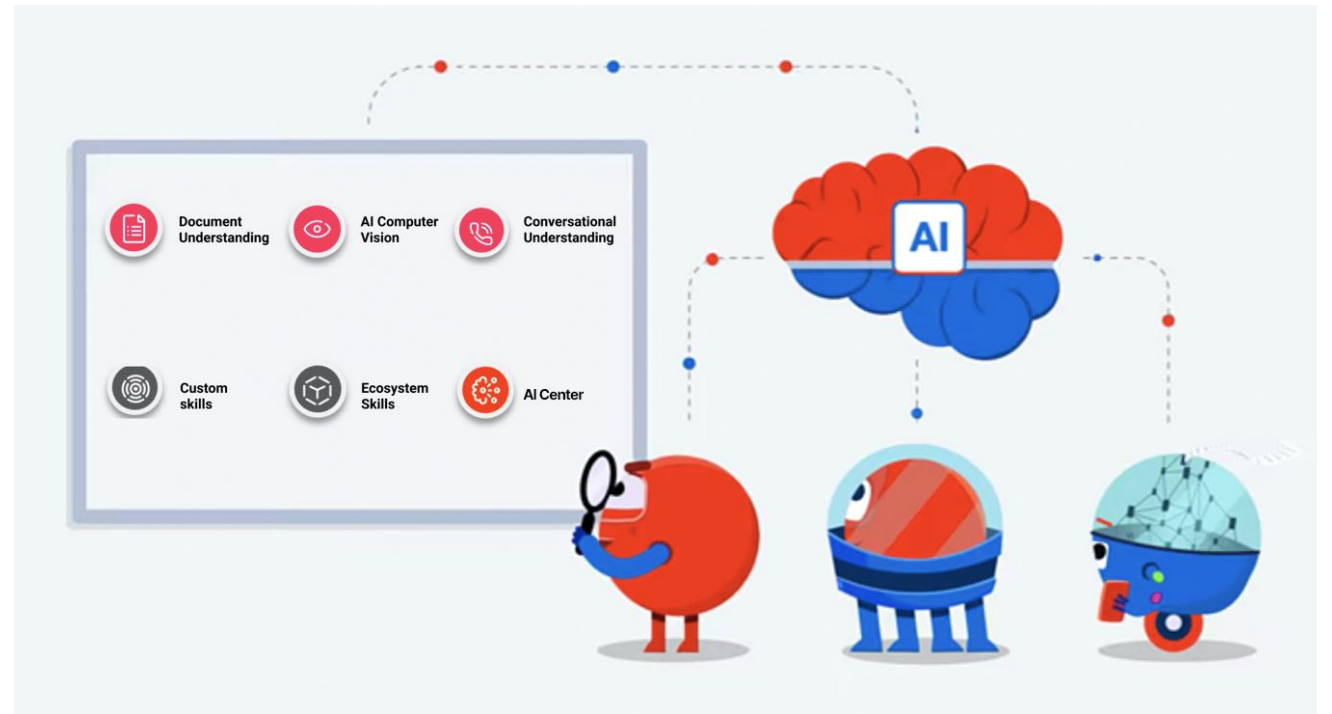


Extracts structured and semi-structured data from different types of documents.









Accomplish More - with Intelligent Software Robots

UiPath software robots are intelligent, reliable, flexible, and eager to take on a huge range of tedious tasks. They're also easy to build and manage, so you can launch an entire robot workforce to quickly deliver efficiencies, higher performance, and high ROI.



Departments and Processes that Can be Automated

|  HR |  IT |  Financial |  Operations |  Customer Service |  Support |
|---|--|--|---|--|--|
| Simplify front and back-office operations <ul style="list-style-type: none">▪ Improve integration between information and data security▪ Greater accuracy and elimination of human errors | Standardize IT processes <ul style="list-style-type: none">▪ Integrate different products/suppliers to manage IT tickets more efficiently▪ Reduce resolution time and improve quality through faster responses | Simplify payment processes <ul style="list-style-type: none">▪ Greater accuracy and elimination of mathematical errors▪ Payment processing, purchase orders, email confirmation, and invoicing | Improve inventory and supplier management processes <ul style="list-style-type: none">▪ Manage unstructured databases▪ Make information transmission more agile and secure▪ Reduce costs | Customer service through intelligent virtual assistants (24/7) <ul style="list-style-type: none">▪ Faster service▪ Increased customer satisfaction and retention | Reduce resolution time and improve quality through faster responses <ul style="list-style-type: none">▪ Increase customer and employee satisfaction |

RPA is the perfect option for processes that are:

Manual and Repetitive; Rule-based; Low Level of Exceptions; Standard Input Types; Large Volume of Data; No Changes to Systems or Rules; Enable Humans to Focus on Higher-Value Tasks.



UiPath™ Process Mining



Seamlessly connect to applications like SAP, Salesforce, and Oracle, and create Process Mining Apps tailored to your process transformation objectives



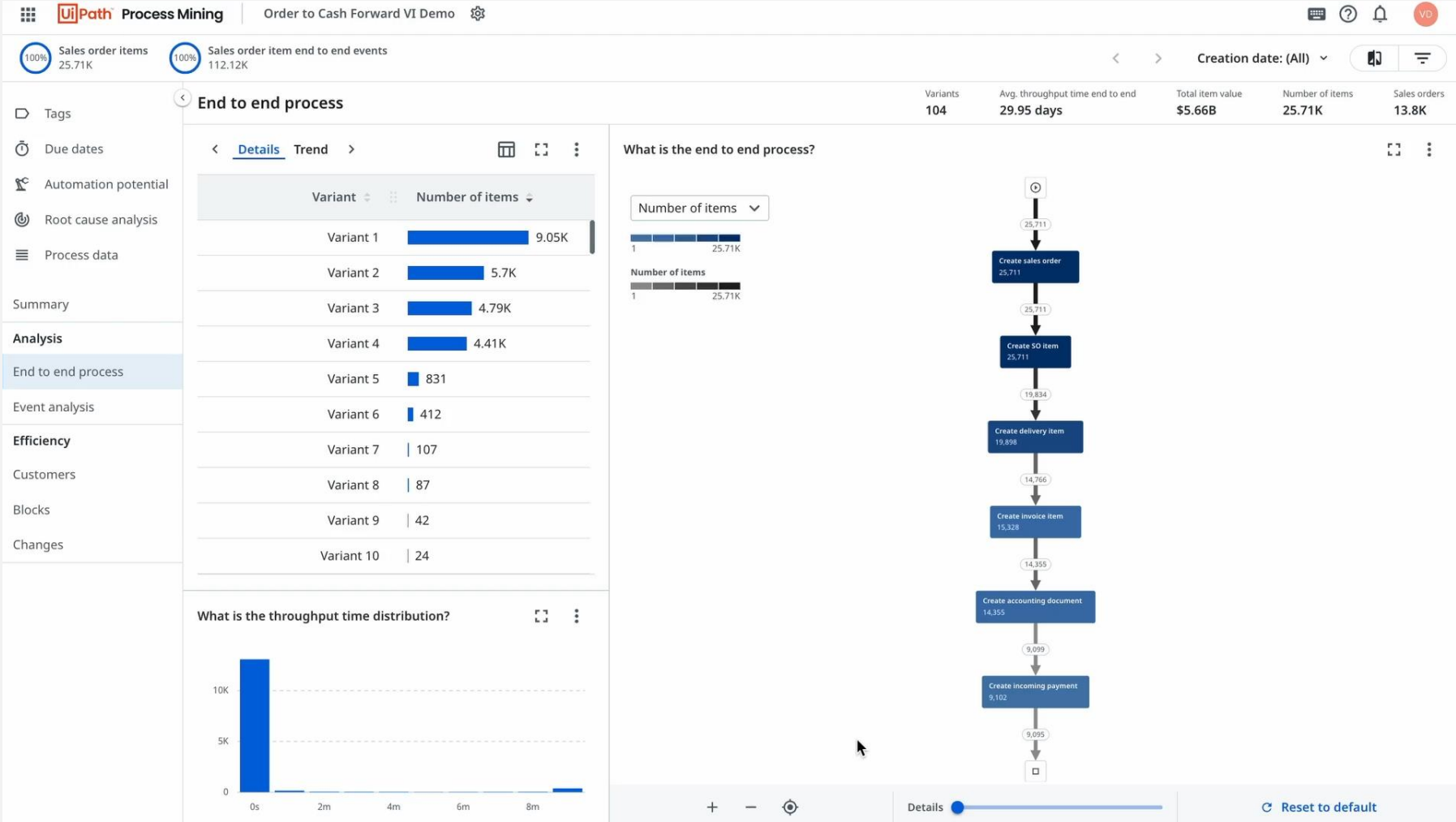
Gain full process transparency, identify bottlenecks and deviations, and make informed decisions with AI-driven cost and time analysis



Simplify processes, automate where it makes sense, and create new workflows for meaningful transformation outcomes



Leverage continuous monitoring capabilities to make smarter automation decisions and ensure your strategy keeps delivering value





UiPath Task Mining



Centrally manage data captured at scale



Visualize task variations and detailed metrics around them



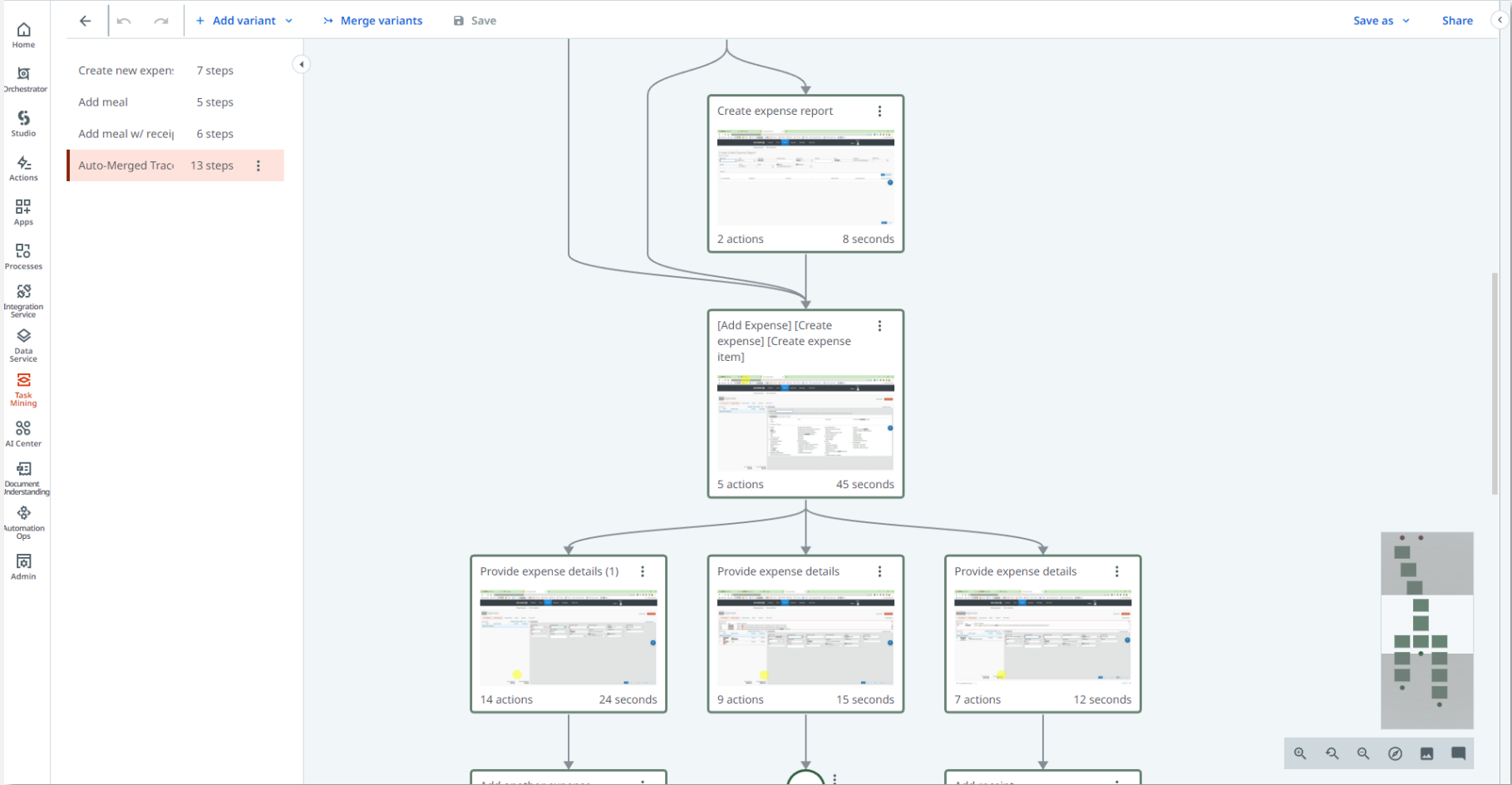
Export to Process Definition Document (PDD), Studio (XAML), or Automation Hub



Pre-configured PII data masking



Role-based access control (RBAC)





UiPath™ Communications Mining

No-code, guided user experience

Real-time monitoring & alerts

AI Guardrails including human-in-the-loop

Generative AI to automate more, and accelerate model training

Quality of Service reporting in Communications Mining

UiPath™ Communications Mining

Accounts Payable – Labelled

Train

Discover

Explore

Validation

Reports

Models

Streams

Settings

Filters

Clear all

Recent

VERBATIMS

THREADS

Timestamp

All dates

From

dd-mm-yyyy

To

dd-mm-yyyy

Add a new filter

Entities

+ Add entity filter

All

Date

Invoice Number

Payment Amount

Labels

+ Add label filter

Search labels

All

Showing 20 recent verbatims (page 1 of 19,057 results)

Payment Status Update

supplier@company.com

5 of 5

Dec 31, 2022 4:55 PM UTC

To

accountspayable@precisiontech.com

Hello Accounts Payable Team,

Thank you for your response. We understand that delays can occur, and we appreciate your efforts to resolve this matter.

To ensure there is no further confusion, we kindly request that you provide us with the expected payment date and confirmation once the payment has been processed.

We value our business relationship with PrecisionTech Manufacturing Inc and look forward to the timely resolution of this payment issue.

Thank you for your attention to this matter.

...

Payment > Status > Request

0.2

2.1

QoS

Tone

Reminder: Overdue Payment

accountspayable@precisiontech.com

2 of 2

Dec 31, 2022 2:30 PM UTC

To

supplier@abcgoods.com

Hi John,

Thank you for your email. We apologize for the delay in processing the payment for invoice XYZ2022123.

I have escalated the matter to our Accounts Payable team, and they are looking into it urgently. We understand the importance of timely payments and assure you that we are working to resolve this issue as quickly as possible.

Once the payment is processed, we will notify you immediately. We appreciate your patience and cooperation.

...



UiPath Automation Hub



Automation opportunity pipeline management in one place



High-level and detailed opportunity assessment



Automation Profile page for every automation idea



ROI calculator



Documentation repository



Pre-built dashboards

UiPath Automation Hub

Workspace

Explore

Dashboards

Admin console

Submit idea

99+

99+

?

Tenant: Demo

MA

Automation pipeline

Download CSV

All (2253)

Review (1838)

Decision pipeline (62)

Implementation (260)

Live (85)

Automation goal

Submitter's business unit

Idea source

Automation Area

Automation Category

Automation Sub-Category

Level 4

0 hrs

134713 hrs

Global overview

Interact with pie chart below to highlight automations in those categories.

● Difficult

● Medium

● Easy

7 Automation

0 Est hours saved

3 Automation

165,980 Est hours saved

9 Automation

35,399 Est hours saved

Difficult

Medium

Easy

Automation potential

0%

100%

Invoice Demo

HRS Saved 5,468 hrs

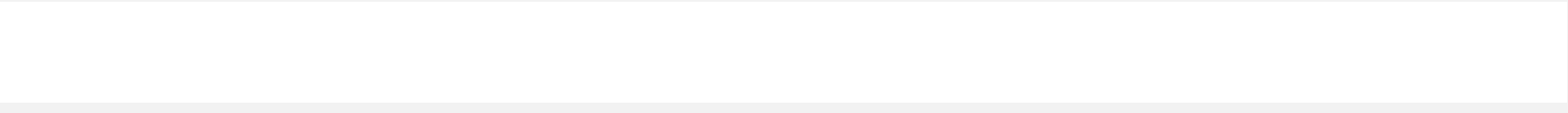
Automation potential 88%

Ease of implementation 86%

0%

100%

Ease of implementation





UiPath™ Studio Web



Your starting point in your automation journey



Develop cross-platform automations & learn the fundamentals through API triggered scenarios & Web based UI Automation

UiPath™ StudioX



Additionally, automate desktop focused scenarios using native desktop UI Automation & advanced desktop Office support



Go back and forth between web & desktop for cross-platform projects

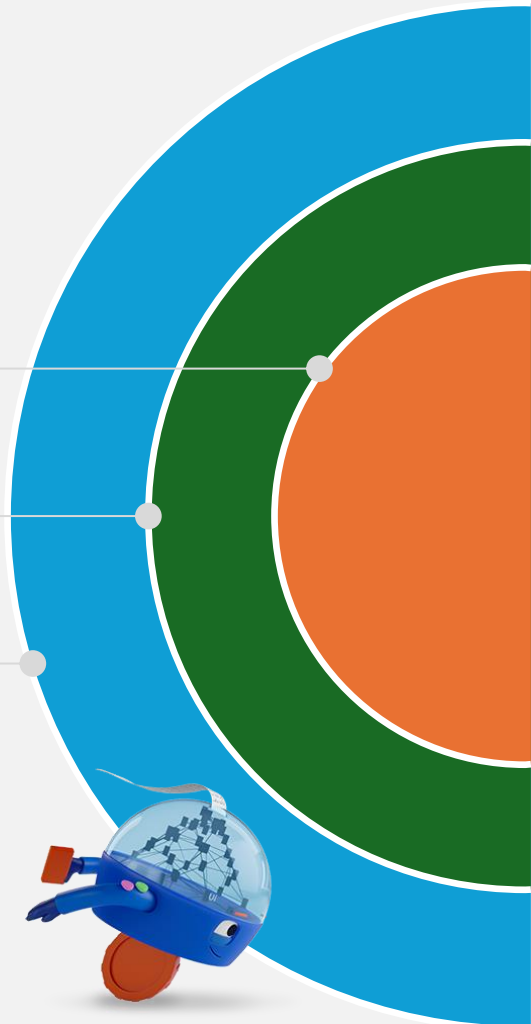
UiPath™ Studio



Multiple file support, integrate additional sequences, flowcharts, state machines or even your preferred language low-level code. Use advanced debugging & troubleshooting tools, advanced UI Automation. Include dev ops best practices through Test Automation & RPA Testing capabilities



Go back and forth between web & desktop for cross-platform projects





UiPath Studio



Robust debugging



Workflow recorders, wizards, selectors, Document Understanding



Source control integration



Custom code integration with VB.NET, Python, AutoHotkey, JavaScript, PowerShell, and Java directly into automations



Reuse resources to speed up automation with Object Repository and native integration with Data Entities



Collaboration

Git, TFS/VSTS, SVN Integration
File Diff and Compare Changes



Usability

Command Palette
Keyboard Shortcuts
Global and Project Settings



Productivity

Manage Dependencies
Activity Project Settings
Selectors



Reusability
Libraries

Custom Templates

UiPath Studio



Code Quality

Workflow Analyzer
Create Custom Rules
Validate



Debugging

Breakpoints

Call Stack, Immediate, Locals, Watch
Test Activity and Create Test Bench



Extensibility

Project Templates
Browser Extensions
Automate SAP and Citrix Technologies





UiPath Studio Web



No IT dependencies, no installation



No programming experience needed



Cross-platform automations















API triggered scenarios & Web based UI Automation



Templates Projects Automations Runs Connections

Search projects by keyword, trigger or app used

New project

| Project name | Owner | Last modified | Trigger and apps |
|---|-------|---------------|---|
| <div><div>My Test Automation Send a message via Slackbot containing the organizer, the subj...</div></div> | me | 20 hours ago |  ⋮ |
| <div><div>Send an email when a file is added to Google Drive ... Get email notifications via Gmail when new files are uploaded.</div></div> | me | 8 days ago |  ⋮ |
| <div><div>Merge PDFs from Outlook email attachments and u... Merge all attachments received via Outlook email into a single ...</div></div> | me | 8 days ago |  ⋮ |
| <div><div>Convert Word file to PDF and store in OneDrive When a new Word file is uploaded to a folder in OneDrive, con...</div></div> | me | 8 days ago |  ⋮ |
| <div><div>Test</div></div> | me | 8 days ago |  ⋮ |
| <div><div>Upload to Google Drive images from PDF attachme... Use Document Understanding to export charts, graph or other...</div></div> | me | 9 days ago |  ⋮ |



UiPath™ Integration Service

Create superior API automations to across any app or system



Large catalog of pre-built connectors, including a collection of generative AI/ML integrations



Build your own connector with Connector Builder



Curated activities for a uniform and simplified integration experience for users, developers and partners



Robots react and respond automatically with event-driven triggers to any business process event

6000+

Active organizations



PREVIEW

Build your connector

PREVIEW

Act! 365

Created by UiPath

PREVIEW

Adobe PDF Services

Created by UiPath

Content management

Box

Created by UiPath

Sales and marketing

Campaign Monitor

Created by UiPath

Collaboration

Cisco Webex Teams

Created by UiPath

Content management

Dropbox Business

Created by UiPath

Healthcare

Epic FHIR R4

Created by UiPath

Finance and accounting

Expensify

Created by UiPath

Productivity

Google Sheets

Created by UiPath

Artificial intelligence

Google Vertex

Created by UiPath

Computer vision

Google Vision

Created by UiPath

Sales and marketing

Mailchimp

Created by UiPath

Sales and marketing

Marketo

Created by UiPath

Developer

Microsoft Azure

Created by UiPath

Artificial intelligence

Microsoft Sentiment

Created by UiPath

Productivity

Microsoft

Created by UiPath

Sales and marketing

Salesforce Marketing Cloud

Created by UiPath

CRM

SAP Customer

Created by UiPath

CRM

Sugar Professional

Created by UiPath

CRM

Sugar Professional

Created by UiPath

Create new connector

Start from API definition

Import Swagger, Postman Collection or a connector export file.

Start from a blank connector

A blank canvas to create your connector.

From local file

From URL

My Workspace > Connector > Microsoft Azure OpenAI

Microsoft Azure OpenAI

[Read documentation](#)

A connector for the Microsoft Azure OpenAI API that allows users to make requests and get completions using Large Language Models (LLM) and other supported models.

Build

Connections

Triggers

Activities

Build an Automation in Studio Web from scratch

Use this quick action to start a Studio Web project with this connector

Build an Automation in Studio Web from template

Use this quick action to start a Studio Web project with this connector

Build an Automation in Studio Desktop

Use this quick action to start a Studio Desktop project with this connector



UiPath Apps

Your awesome automations deserve a beautiful front door



Create automation-powered apps just by scanning a PDF (with Autopilot for Apps - [Insider Preview](#))



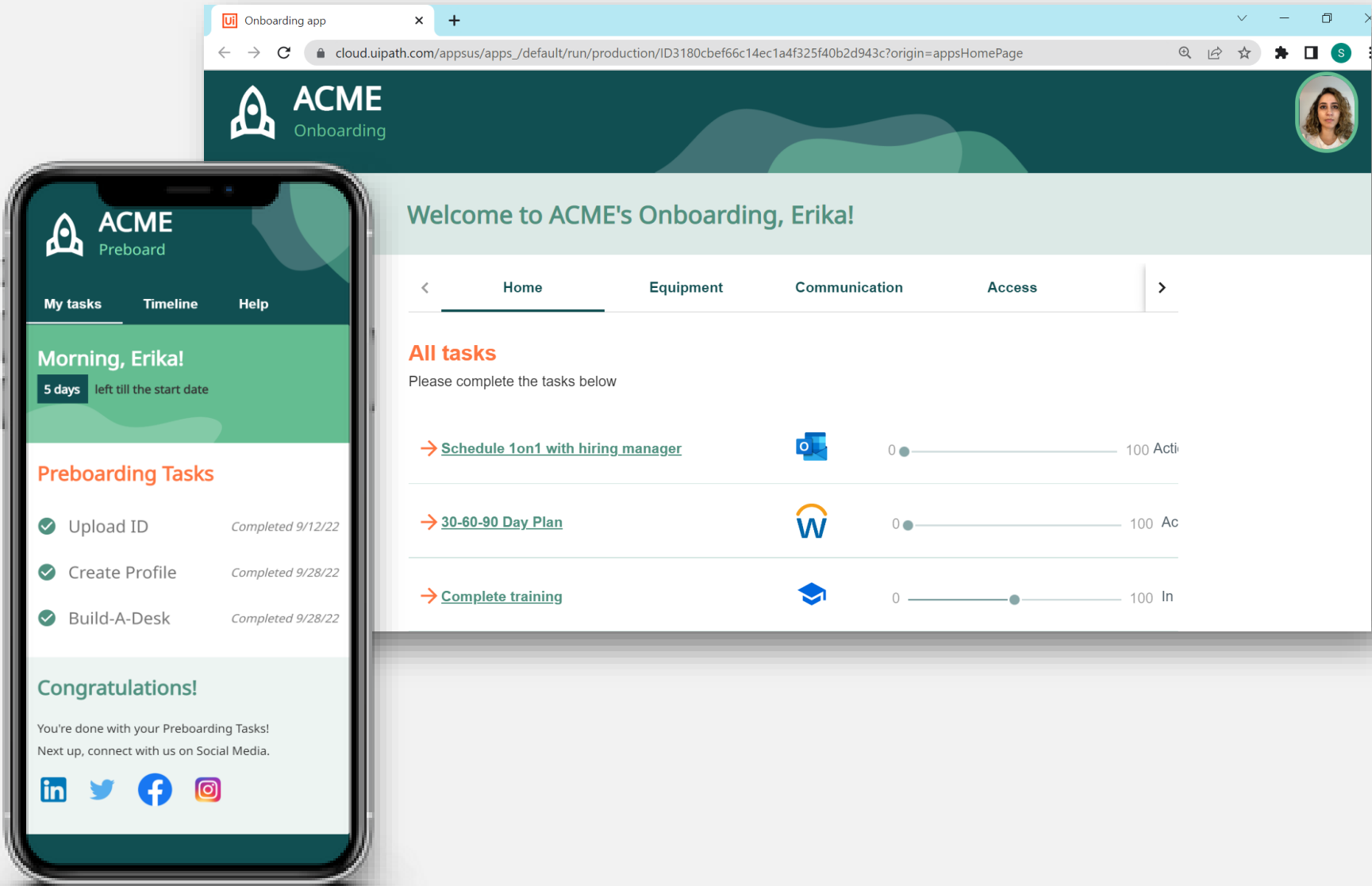
Cut down on customer calls by offering public-facing apps for self-service



Govern your app rollout and access with ease



Leverage app templates to build in half the time





UiPath™ Automation Launchpad

The GPS for your company's automation journey



Evangelize your automation program from one spot



Grow an internal automation community



Customize Launchpad to fit your company's specific automation curricula



Gamify your automation rollout with leaderboards

UiPath™ Automation Launchpad



Welcome to the RPA program at UiPath!

We would like to empower you to learn, use, and build automations so you can spend more time on the things you love! We encourage you to try out some of the starter automations, read about inspiring employees, and check out the most active automations being used by your colleagues!

[Learn more about RPA @ UiPath](#)



See what we're automating at UiPath

Recommend to try

Employee spotlight

UiPath's top 10

S

Split PDF

M

Mute all notifications

C

Copy Text from Image

R

Reduce Excel file size

C

Convert my file to another format

R

Rename and move files from a folder

Split PDF

Overview

The Split a PDF File automation allows you to quickly extract individual pages from a single PDF. It accesses the designated PDF file, extracts each page as its own PDF and renames it with the page number. The automation is great for splitting collated PDF files, quickly renaming a PDF file or grabbing a desired page from a PDF.

Demo

The goal of our program is a happier you

Program highlights

- 5001 Active users
- 2242 Hours earned back
- 536 Processes in use

[Get help](#)

News

New automation release

We released a new automation that will allow you to automatically split your large PDF files into individual files. Kudos to Lisa for the great idea. Check it out in the automation store!

2/7/22

Exciting news!

We will be hosting a 2 day Bot-a-thon with a \$100 cash prize for the winner and participation goodies. Please get

Upcoming events

- | | |
|---|-------------------------|
| Bob Smith shows how he automated his work | 2/7/22 10:00 am EST |
| Add to calendar | |
| RPA office hours - EMEA | 2/20/22 6:30 am EST |
| Add to calendar | |
| Intro to RPA lunch | 2/22/22 12:00 pm EST |
| Add to calendar | |



UiPath™ Robots

Accomplish more—with more intelligent software robots



Automation Cloud™ Robots

- Build and run robots in UiPath Automation Cloud™—with zero infrastructure
- Serverless or VM-based



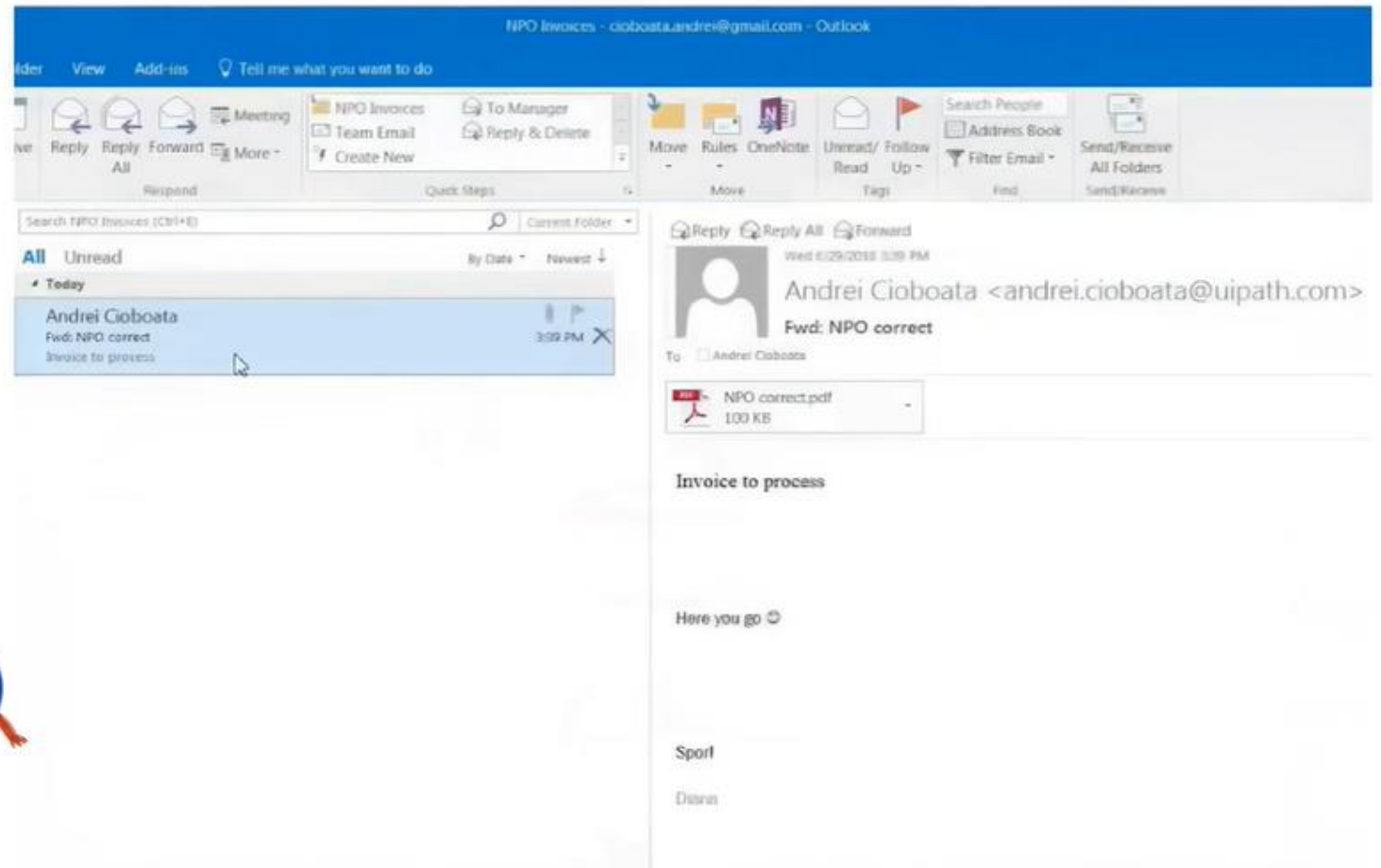
Attended Robots

Enable every employee with a personal digital assistant to help with daily tasks



Unattended Robots

- Automate task-heavy, long-running workflows
- Self-host, on-premises, or in public cloud





Automate

[Studio Family](#)

[Integration Service](#)

[Apps](#)

[Robots](#)

[Assistant](#)

[Action Center](#)

[Data Service](#)

[Document Understanding](#)

[AI Center](#)

UiPath™ Assistant

A personal digital assistant for every employee



Engaging desktop interface to access, manage, and run attended automations



Available on Windows and MacOS



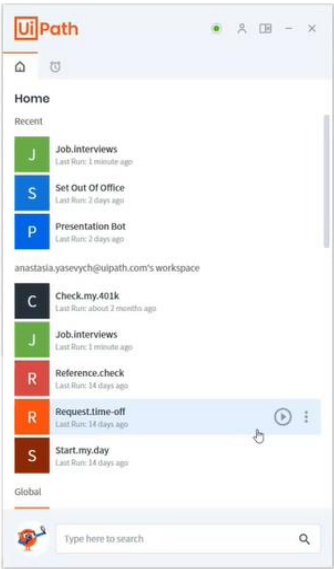
Access to Apps, Action Center, Automation Hub, and Marketplace directly from Assistant



Ability to work side-by-side with a robot in Picture-in-Picture mode

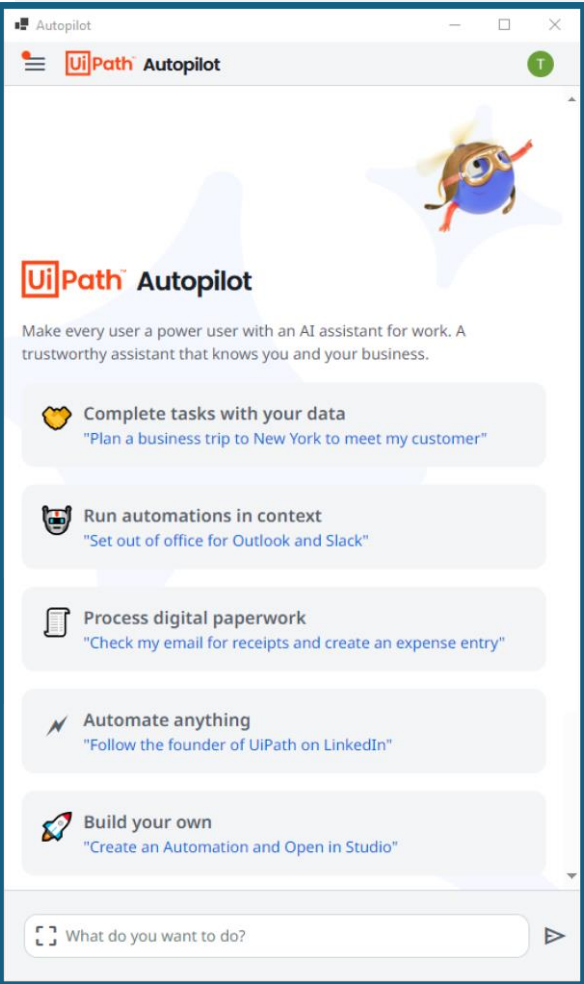


Centralized governance



Autopilot for Assistant, the AI companion

- Contextual guidance—across business apps and systems
- Interactive chat, powered by Generative AI
- Access to UI and API automations
- Access to UiPath specialized AI models
- One-click export to Studio Web





Automation Cloud Robots

The fastest, easiest way to build and run unattended robots



Instant, limitless robot power with zero infrastructure



Windows VM-based robots run from standard or customized images



Serverless Automation Cloud Robots run cross-platform API and web-based automations



Supports third-party software installation, automated domain join, and site-to-site VPN connection back to your own network



SOC2® Type 2 & HIPAA Type 2 attestation

Tenant

Home

Orchestrator

Studio

Actions

Automation Hub

Apps

Processes

Insights

Integration Service

Data Service

AI Center

More

My Folders

Search

My Workspace

Shared

Machines / Machine template

General details ⓘ

Template name *
Serverless Automation Cloud Robot Pool

Description
Instant execution

Tags

Labels

Properties (Key-val)

Tenant

Home

Orchestrator

Studio

Actions

Automation Hub

Apps

Processes

Insights

Integration Service

Data Service

AI Center

More

Machines / Add Cloud Robot - VM

General Details

VM & Runtime details

Maintenance Window

General Details

Name *

Description

Execution slots per machine
1

Each slot counts towards 1 Cloud Robot - VM

Cancel

Next



How to set up and run Automation Cloud Robots





UiPath™ Action Center

Collaborate and automate more, more efficiently



Human-in-the-loop for seamless automation of advanced processes



Long-running workflows that span over days, weeks, and multiple business units—all efficiently automated



Automation on-the go so you can act whether you're at your desk or on the move, with access through the web or mobile app



Platform integrations for Document Understanding, Process Mining and AI Center

Easily trigger unattended processes

Initiate unattended processes through form-based input and file upload

Stay updated on the status and results of the automatons

Get insights into process data and execution details

UiPath™ Processes

Search...

1

CreatePowerPointPresentationfromD...
Scrape data from a website and use it to create a PowerPoint presentation
Folder name: Finance
Last published: 2 months ago
Version: 1.0.1

2

InvokeTaskCreationJobs
Process to read from BE systems and trigger task creation job based on a batch size
Folder name: Finance
Last published: 5 months ago
Version: 1.0.9

CreateTasksAndWait
Creates tasks and waits for them in batches as defined
Folder name: Finance
Last published: 5 months ago
Version: 1.0.8

ResumeAfterDelayTest
Action in parallel to resume
Folder name: Finance
Last published: 5 months ago
Version: 1.0.8

Queue Delete Process
Orchestration Process
Folder name: Finance
Last published: 6 months ago
Version: 1.0.3

Sales Quote Dispatch
No description available
Folder name: Finance
Last published: 7 months ago
Version: 1.0.65

Invoice and Claim processing latest
Process invoice and expense documents uploaded by employees
Folder name: Finance
Last published: 7 months ago
Version: 1.0.46

SAPExpenseProcessing
No description available
Folder name: Finance
Last published: 8 months ago
Version: 1.0.6

UpdateSAP
No description available
Folder name: Finance
Last published: 8 months ago

SAPInvoiceProcessing
No description available
Folder name: Finance
Last published: 8 months ago
Version: 1.0.15

Process Invoices and Claims
No description available
Folder name: Finance
Last published: 8 months ago
Version: 1.0.46

Sales Quote
Sales quote dispatch processing with country specific approvals
Folder name: Sales Ops
Last published: 8 months ago

Relocation Expenses
Relocation expense processing for high value in voices
Folder name: Finance
Last published: 8 months ago

Relocation Expense processing
No description available
Folder name: Finance
Last published: 8 months ago
Version: 1.0.80

Sales Quote Dispatch
Process sales quote requests from customers after necessary approvals and generate dispatch...
Folder name: Sales Ops
Last published: 8 months ago
Version: 1.0.59

Relocation Expenses
Relocation expense processing based on approvals
Folder name: HR
Last published: 8 months ago

Provide Input for 'Sales Quote Dispatch'

CustomerName ⓘ
Thomson Reuters Demo quote

Email ⓘ
it@tr.com

ContactNumber ⓘ
+91876549367793

ProductName ⓘ
UiPath PS Hours

Description ⓘ
Implement Test Suite

Quantity ⓘ
200

QuoteEmail
File Name
Drop files to attach, or browse

StartDate
yyyy-MM-dd hh:mm a

☐ RequireTestLicenses

Submit

Cancel

3



UiPath™ Data Service

Model, manage, and store business data with just a few clicks, and no code



Multiple data types creation like text, numeric, relational, files and more



Integrate with any enterprise or legacy system, database or other custom apps to aggregate and store data



Simple one click import of data and rich entity objects into Studio and Apps



Role-based access control to secure your automation data



UiPath Data Service (Preview)

Create New Entity +



Search

Use in Studio Refresh

| Display Name | Name | Description | # of Fields | # of Records | Last modified on |
|--------------|------|-------------|-------------|--------------|------------------|
|--------------|------|-------------|-------------|--------------|------------------|

To start, create an Entity by clicking on the button below.

Create New Entity +



Model manage, and store data with Data Service





Automate

[Studio Family](#) [Integration Service](#) [Apps](#) [Robots](#) [Assistant](#) [Action Center](#) [Data Service](#) [Document Understanding](#) [AI Center](#)



UiPath™ Document Understanding

Intelligently process documents using AI



Pre-built Specialized AI models for the most common document types across industries and domains



Enhanced with Generative AI for unstructured documents and to accelerate time to value



End-to-end document processing at scale integrated into the leading AI-powered automation platform



The next-gen guided user experience with active learning—no coding or ML skills needed*

UiPath Actions

OverviewInboxAdmin Settings

#56026 - ID Card: 1_CONNOR DRIVERS LICENSE Pending

My Actions

Search...

Filter (1) Clear all

Time: Last week

PendingUnassignedCompleted

ID Card: 1_CONNOR DRIVERS LI...
#56026
default_du_actions
No Labels Added
4 minutes ago

Loan Application Form: loan_ap...
#56027
No Labels Added
2 minutes ago

Employment Letter: 3_Loan_App...
#56029
default_du_actions
No Labels Added
2 minutes ago

End of List.

Confidence OCR Extraction

ID Cards

Document Type Validated

Last Name Validated

First Name Validated

Birth Place Validated

Birth Date

Do you want to continue? Continue & save No

1 / 1

New York State USA
DRIVER LICENSE
ID 123 4567
CONNOR SAMPLE
1234 EMBLEMS STREET
FARMINGTON PLACE, NY 45673
Sex M Height 6'1" Eyes BRO
DOB 08/12/1987 Expires 08/25/2025
AUG 87 Issued 08/18/2022
Organ Donor ABC0123456

* Active learning currently available in preview, GA in 2024.4



UiPath AI Center™

Enhance your automations with AI



Studio integration: easily integrate ML models into your processes with a drag-and-drop experience



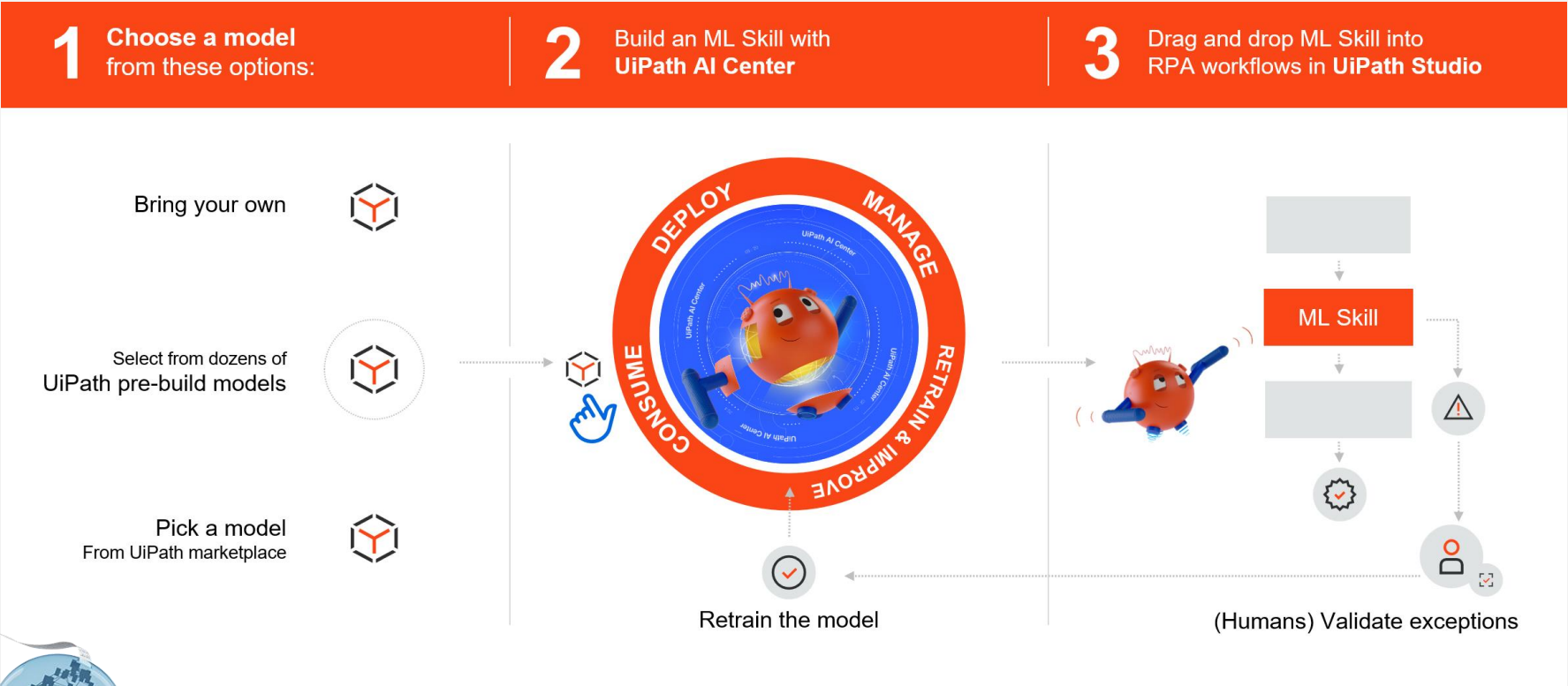
Model flexibility: Use our pre-built models or import your own to create business-specific AI-powered automations



Optimized workflows: gain a refined view of your data, user activity, and model performance to enhance your workflows



ML command center: manage the entire cycle of ML models - from deployment to improvement - with a single, streamlined interface



UiPath Insights



Dashboard library: build your own or use a pre-designed template, customized with the KPIs specific to your business



Situation awareness: get real-time updates on crucial occurrences and milestones



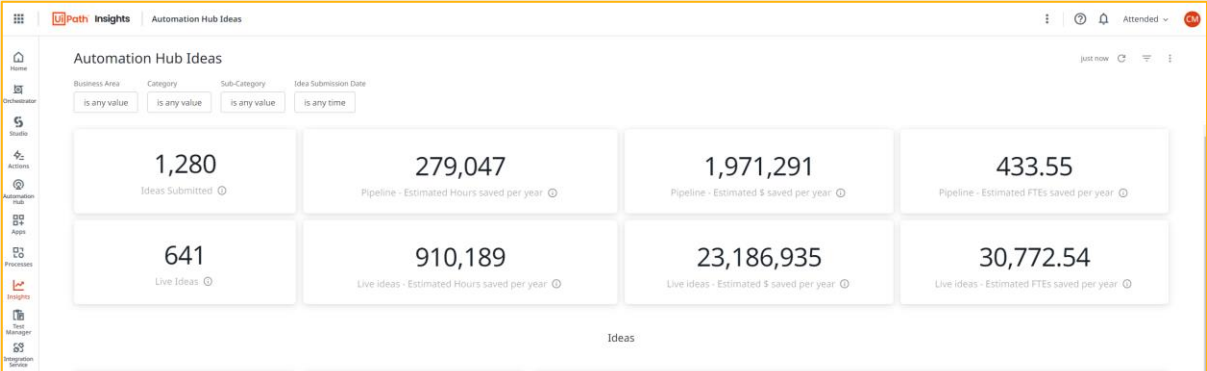
Performance tracking: measure and analyze to spot trends and improvement areas



Consistent reporting: share customizable reports with your stakeholders



Platform integrations: connect reporting to Automation Hub and Document Understanding




UiPath Test Manager


SAP Heatmap


SAP Change Impact Analysis


Low-code and coded automations


50+ ALM tool integrations


Autopilot™ for Testers (in Preview – GA 2024.4)

- Generate step-by-step tests from requirements
- Generate code from test steps
- Insights from test results

UiPath Test Manager

UiBank Web Application

Dashboard

Requirements

Test Cases

Test Sets

Test Results

Project Settings

Projects > UWE > Requirements > UWE:88

Create Loan Request

Overview Documents Details

Description

As an existing UiBank customer, I want to apply for a loan through the UiBank online portal, so that I can secure additional financing.

Acceptance Criteria

- The user must be authenticated on the UiBank portal.
- The user should be able to navigate to the 'Loans' section under the 'Products' menu.
- Upon clicking the 'Apply For a Loan' button, the loan application form should be displayed.
- The loan application form should have the following mandatory fields:

Generate Tests Tasks

Labels

Click to add label

Created by: External, 7 months ago

Updated by: External, a few seconds ago

UiPath Test Manager

Demo Project

Dashboard

Heatmap

Requirements

Test Cases

Test Sets

Test Results

Project Settings

Impact Analysis

Switch to table view and select the transactions for which you want to create test sets.

Search...

All transaction types

All interface types

Basis Components

Logistics - General

Materials Management

Sales and Distribution

Financial Accounting

Controlling

Customer Object Page [F] (mdmumd.customer.manage)

Change Purchase Order [T] (ME22N)

Create Purchase Order [W] (ME21N)

Create Sales Orders [T] (VA01)

Change Sales Orders [T] (VA02)

Display Sales Orders [T] (VA03)

Show All

Gap

Fit

Not Impacted

Back Finish



UiPath™ Orchestrator



Long-running workflows keep unattended robots working on their next job while waiting for human input



Predictive SLAs keep your robots meeting your business deadlines



Role-based access control (RBAC) enforces separation of lifecycle capabilities



Monitoring and logs help with debugging, audit, or analysis in third-party tools



Live streaming, remote control and video recording for unattended robots for easy debugging and visibility into task execution

Monitoring
shows the status
of your
automations

**Storage
Buckets**
store the data

Testing enables
you to define and
manage your tests

UiPath Orchestrator

Tenant

My Folders

Search

My Workspace

Home

Automations

Monitoring

Queues

Assets

Storage Buckets

Testing

Settings

Processes

1

Assets

2

Queues

0

Triggers

0

Users

5

Machines

1

Processes are specific package versions that can be deployed to unattended or attended robots

Assets securely store data for authorized automations

Queues contain items that can be processed by automations

Triggers remotely execute processes on unattended robots based on time or event dependencies

Users can be created and managed with full visibility and control

Machines help you configure unattended infrastructure settings

UiPath™ Automation Ops



Out-of-the-box deployment



Applies to existing install base*



Deployed as part of UiPath Automation Cloud™



Tightly connected to Studio and Assistant



Oversight and control without intrusion and undue restrictions



Deployed at organizational level, tailored to individual needs



*Provided the existing Studio version is compatible

Automation Ops

Policies

Deployment

Settings

Create governance policies to enforce your organization's rules and configurations for UiPath products. After creation, all policies must be deployed to take effect.

Search

Product

Upload

+ Add Product Policy

Refresh

| Name | Description | Product | Priority |
|-------------------|---|------------|----------|
| StudioX beginners | Limited access to package streams | StudioX | 1 |
| CoE | Center of Excellency - full access | Studio Pro | 1 |
| RPA developers | Full access to all automation features | Studio | 1 |
| StudioX Advanced | Advanced Citizen Developers | StudioX | 2 |
| Test Automation | QA engineers and Test Automation developers | Studio Pro | 2 |

Items per page

10

1 - 5 / 5

<<

<

>

>>

UiPath Automation Cloud™



The full Business Automation Platform, including SaaS robots



Plugs into your existing environment with identity provider and other key system integrations



Governance for enterprise-scale development and operations



IT automation options



Tenant-level multi-region support



Delayed update and other advanced capabilities



GA

Home

Automation Hub

Actions

Apps

Processes

Insights

Data Service

AI Center

Admin

Help

UiPath™ Automation Cloud™

MultiService

Good afternoon, Geoff

Orchestrator Services

CloudRobots
Last Updated: 21 days ago

MultiService
Last Updated: 14 days ago

License Allocation

Users

Robots & Services

Attended - Named User
5 of 50

Citizen Developer - Named User
5 of 5

RPA Developer - Named User
5 of 5

RPA Developer Pro - Named User
5 of 5

Manage

Design your workflows in UiPath Studio
Build your automation project in UiPath Studio, our complete solution for application integration.
Learn more
Download Studio

Connect your first Robot
The robot is UiPath's execution agent that enables you to run workflows built in Studio.
Learn more
Watch Video

Head over to the resource center for more useful links to get you started.

ATTESTATIONS FOR CORE PLATFORM SOC 2 TYPE 2,
ISO/IEC 27001 AND ISO 9001



UiPath™ Automation Suite



Full platform - Single install in cloud, on-prem Linux VMs, or on bare metal server



Portal access to all services and integrations



Host multiple organizations on one infrastructure



Supported by UiPath end-to-end



Kubernetes infrastructure and tools embedded, or deploy on your current AKS/EKS cluster

GA

UiPath™ Automation Suite

DefaultTenant

Home

Orchestrator

Actions

Automation Hub

Apps

Processes

Insights

Test Manager

AI Center

Admin

Automation Store

Help

Good afternoon, Geoff Anderson

Orchestrator Services

DefaultTenant

Last Updated: 2 hours ago

License Allocation

Users

Robots & Services

| | | | |
|-----------------------------------|---------|----------------------------------|---------|
| Attended - Named User | 0 of 14 | Attended - Multiuser | 0 of 15 |
| Citizen Developer - Named User | 0 of 15 | Citizen Developer - Multiuser | 0 of 15 |
| RPA Developer - Named User | 0 of 15 | RPA Developer - Multiuser | 0 of 15 |
| Automation Developer - Named User | 0 of 15 | Automation Developer - Multiuser | 0 of 15 |
| Tester - Named User | 0 of 15 | Action Center - Named User | 0 of 15 |
| Action Center - Multiuser | 0 of 15 | Insights Designer User | 0 of 14 |

Design your workflows in UiPath Studio

Build your automation project in UiPath Studio, our complete solution for application integration.

Learn more

Download Studio

Connect your first Robot

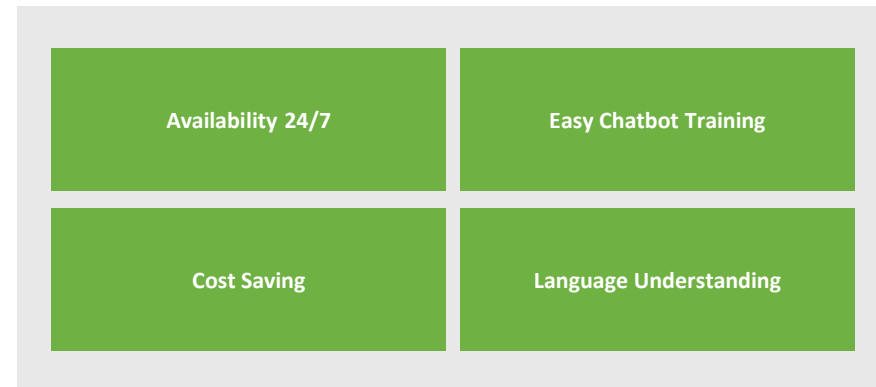
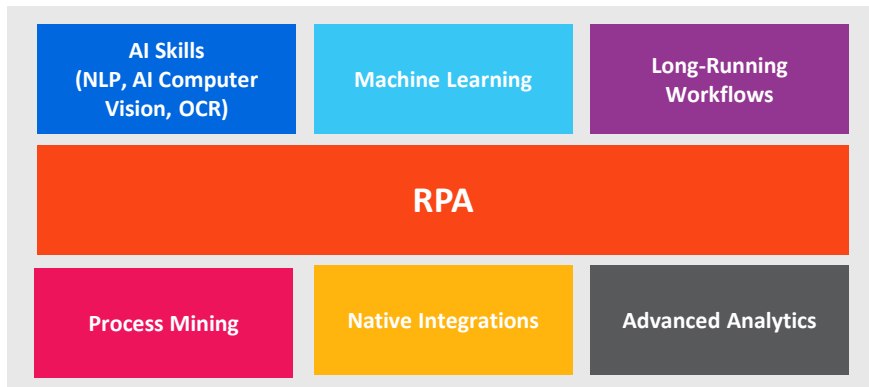
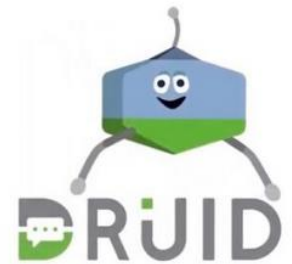
The robot is UiPath's execution agent that enables you to run workflows built in Studio.

Learn more

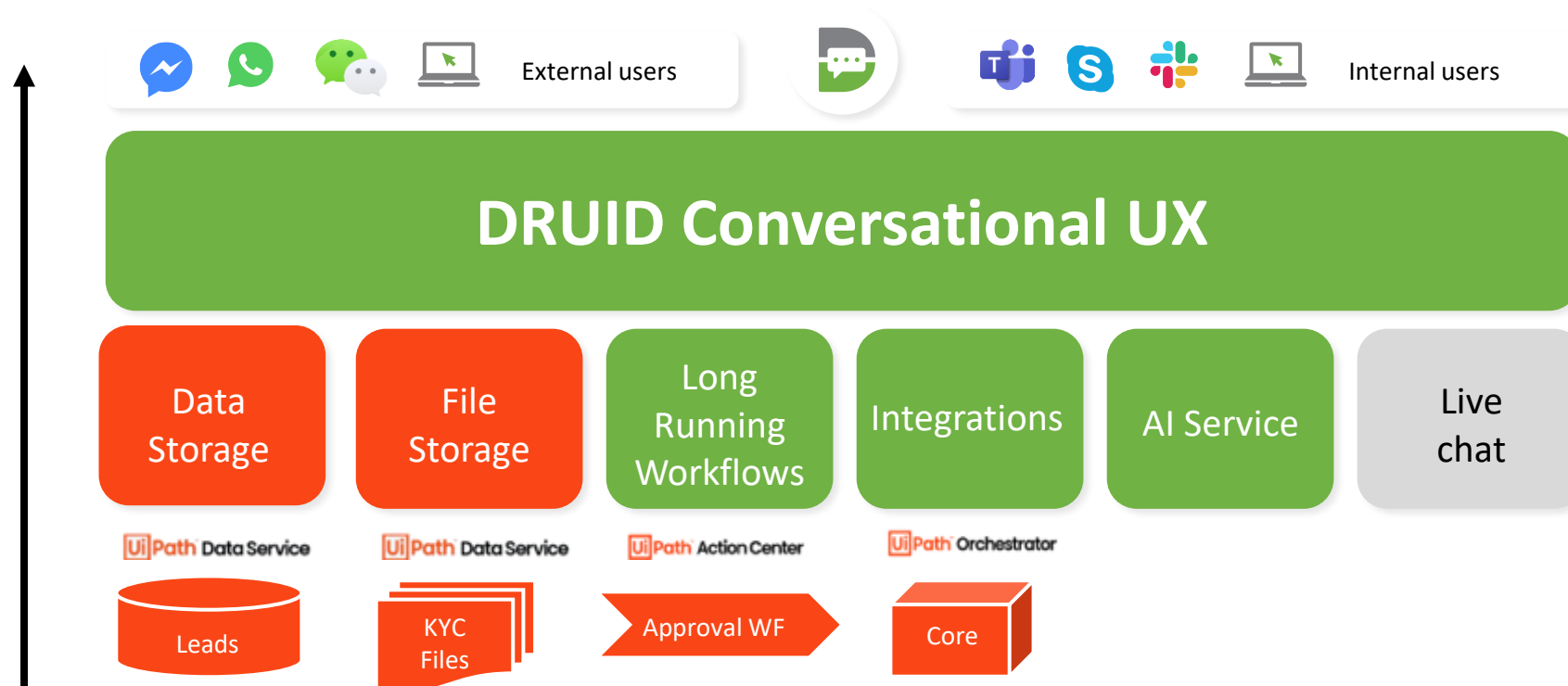
Head over to the [resource center](#) for more useful links to get you started.



RPA Integrated with Conversational AI



RPA Integrated with Conversational AI



The Benefits of Conversational AI

Full Integration with RPA



It integrates with multiple applications, ensuring the entire automation stack, enabling the creation of full conversational apps.

Fastest Time to Value



Designed for business productivity with maximum scalability and custom development.

Accessible to All



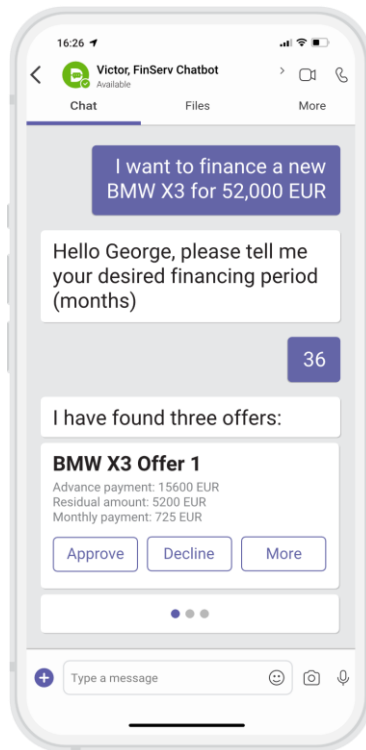
Open AI architecture, perfectly integrable with third-party business technologies and systems.

Low Total Cost of Ownership

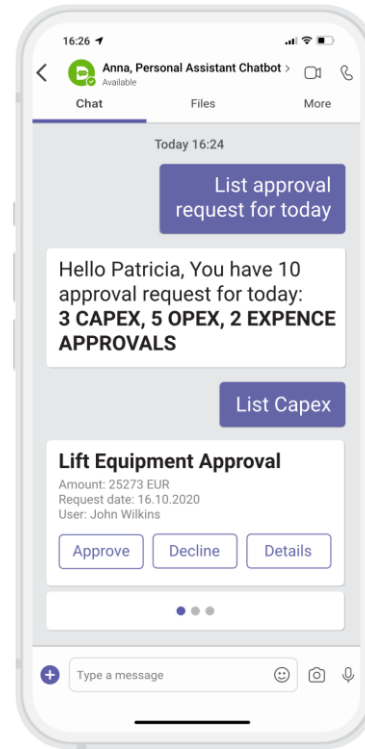


The centralized management, measurement, governance, and security you demand.

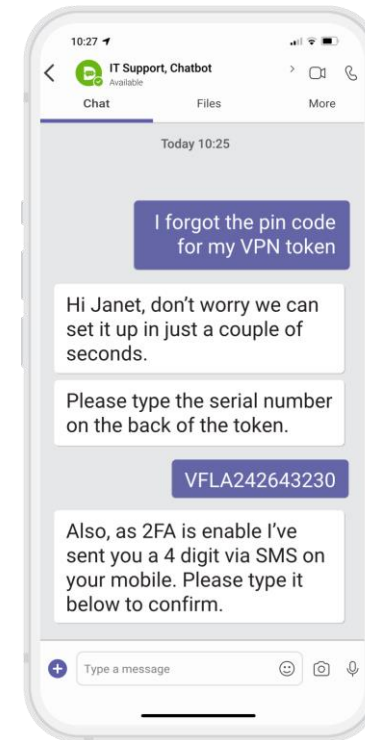
Conversational AI: DRUID Platform



**TRIGGER
ROBOTS
DIRECTLY FROM
THE
CHAT**



**GET HUMAN
FEEDBACK
DURING RPA
PROCESS**



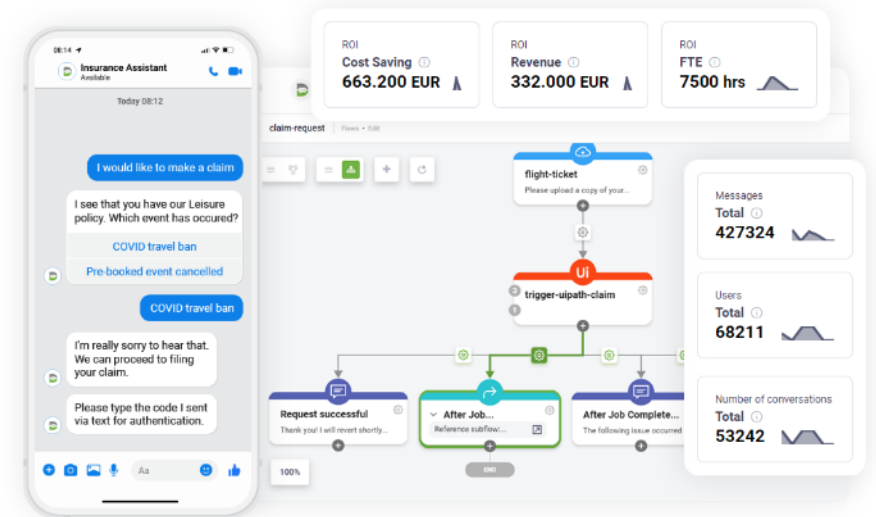
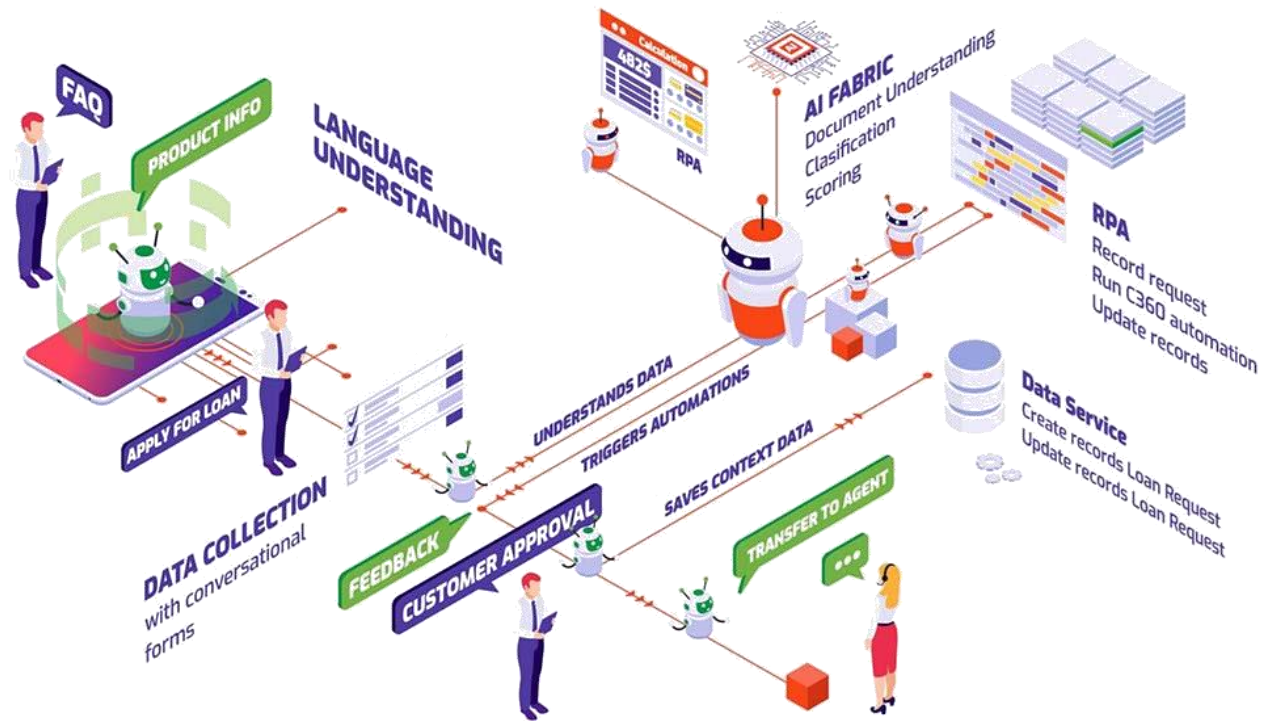
**ASK FOR
STATISTICS
FROM UIPATH
ORCHESTRATOR**

Conversational AI: DRUID Platform

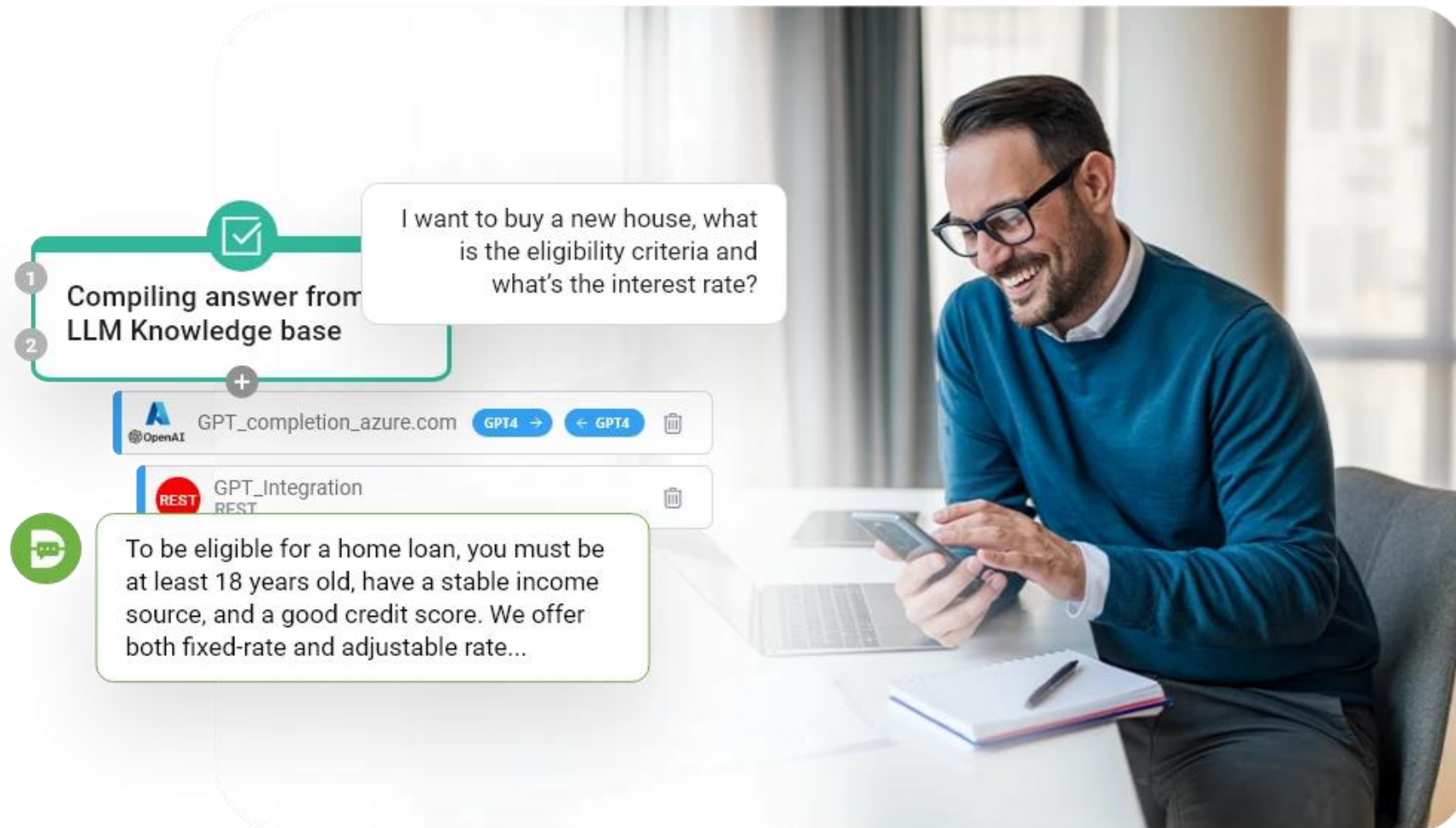
DRUID is a complete platform that enables the creation of conversational business applications and intelligent virtual assistants that perform business tasks.

- ☒ Designed for enterprise productivity with maximum scalability and customized development.
- ☒ Library with over 500 conversation templates covering any automation use case, by industry, function, and process.
- ☒ Proprietary NLU technology with pre-built models and native support for over 50 languages.
- ☒ Privacy and security using the same code across different deployment types (cloud, hybrid, on-prem with Kubernetes HA).

Conversational AI: How Does it Work?



Conversational AI: How Does it Work?



Online Store Automation

Automated Online Store Process

Starseed robots collect orders from the Starseed Portal.

- After validating the data and applying rate and discount calculations, the orders are automatically entered into the Kroll ERP for coverage details.
- Once this step is complete, the robot updates the order status in the Starseed Portal.
- This is a continuous process, meaning the robot processes orders in real time as soon as customers place them.



300

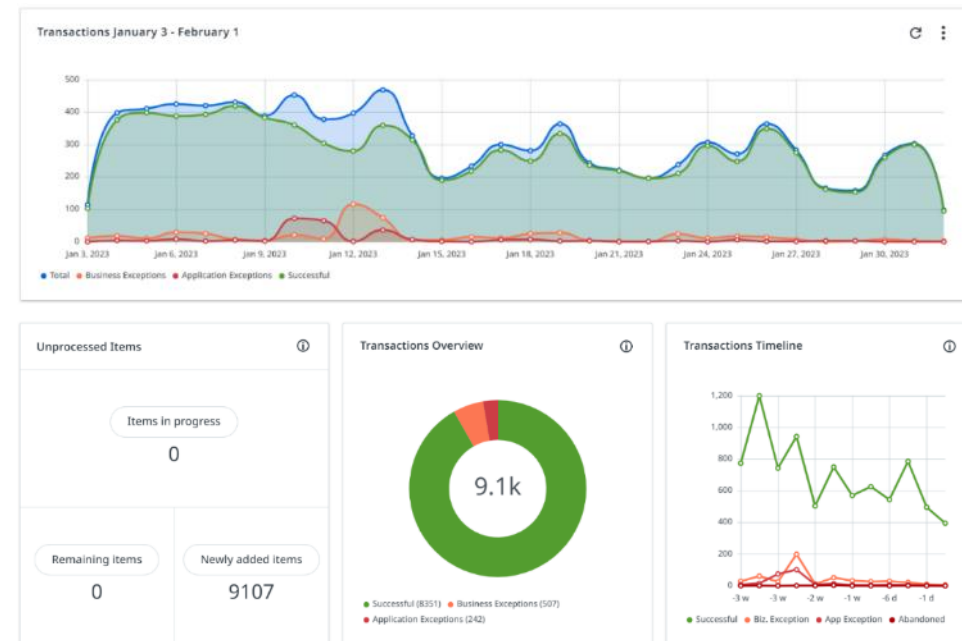
Average daily
orders

250

Steps processed
for each order

2

Robots working
24/7



Online Store Automation

Procurement Processes

Ubiquity has successfully integrated Robotic Process Automation (RPA) into IKEA's Portugal internal request and procurement processes.

This integration has streamlined workflows, reduced processing times, and minimized human error.

As a result, IKEA's workforce has been reallocated to more strategic, value-added activities, fostering innovation and enabling better decision-making.



15

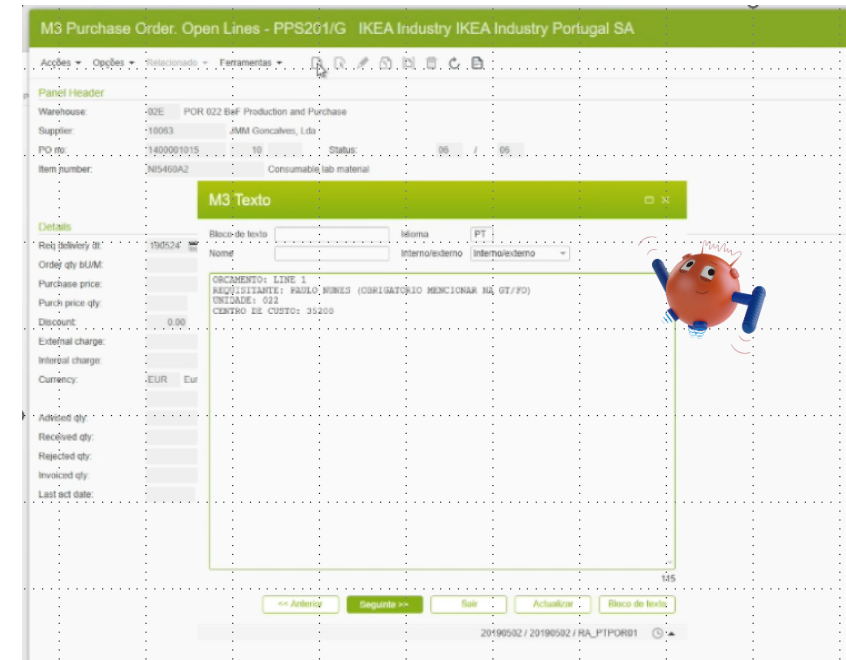
Processes

3000

Transactions per day

1

Robot working 24/7



Customer Operations Automation



Customer Operations

Before automation, Vodafone Portugal's customer operations were entirely manual and expanding rapidly.

To scale production capacity without increasing operational costs—while maintaining high-quality results and meeting service-level expectations—Vodafone implemented automation to reduce the time spent on each request.

5

Automated
Processes

30+

Managed
Processes

50%

Operations Cost
Reduction

100%

Accuracy in Tasks
Process (error-free)











This allowed us to reduce unitary operational costs, increase human production capacity without increasing their effort (the same team can produce more in the same hours of work), and have a scalable solution by easily adding or removing RPA licenses. On average, we automated 50% of each of the 5 processes in scope, resulting in a 50% reduction in costs and duration, which allowed us to release resources in the team without having to recruit new members. ”

Vodafone Portugal, Customer Operations Team

Enterprise Automation



| | BEFORE AUTOMATION | AFTER AUTOMATION |
|--|--|--|
| Multiple Processes | | |
| Finance Tax Bot to retrieve and process VAT |  15h Monthly |  1.5h Monthly |
| Operations & Maintenance Bot to duplicate and/or change schedule maintenance |  16h Duplication for 1000 assets |  30 min On demand |
| Treasury bot to save payment proofs and bank statements on a daily and monthly basis |  16h Monthly |  2h Monthly |
| HR bot to update workforce data for monthly reporting, sending email to process owner |  na |  16 min Twice a Month |
| All processes automatically send email notifications to process owners with process status. | | |

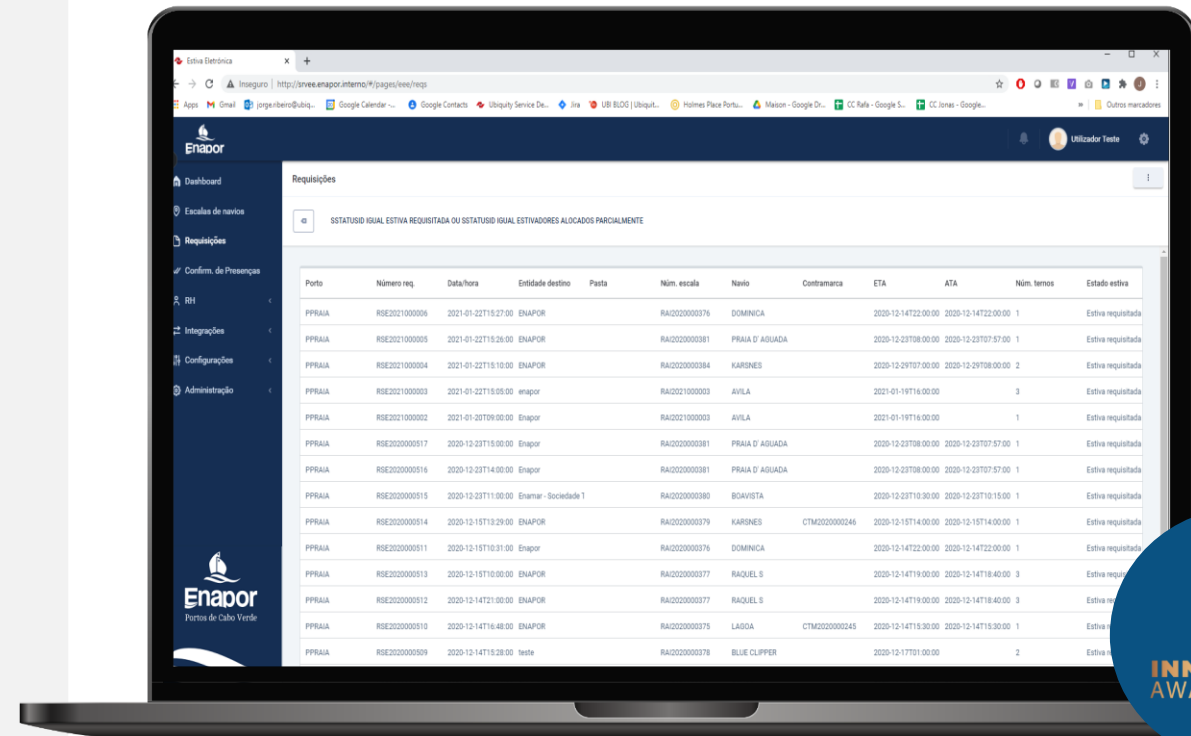
Electronic Stevedoring Platform

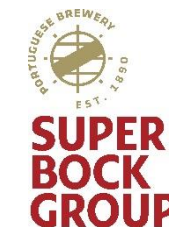
THE CHALLENGE:

While managing the stevedoring work at the 9 ports, ENAPOR was using manual processes leading to unnecessary travel and waiting queues at each port; attendance and absence control issues, and difficulties in monitoring the complete process.

THE SOLUTION:

B2Digital implemented an Electronic Stevedoring System at ENAPOR to enhance transparency in stevedoring operations and optimize process management and resource allocation. Ubiquity digitized the entire process, eliminating waiting queues and unnecessary travel for stevedores. The solution offers greater control over HR operations, including SMS notifications and comprehensive process monitoring through detailed dashboards. The system efficiently manages nine ports, each with unique requirements.





Self-Service Beer Sale

THE CHALLENGE:

Super Bock Group wanted to implement a consumer-focused solution – BeerExperience - to enhance the brewing experience and allow users to pour and enjoy their beer in a self-service station in one of the most touristic places in Porto.

THE SOLUTION:

B2Digital integrated multiple technologies to develop BeerExperience, a modular autonomous system combining sensors, automation, and interactive multimedia. The system is accessible via one-time tickets or a prepaid card, offering an engaging and immersive experience. Beyond user interaction, BeerExperience provides real-time sales data for valuable marketing insights. The project incorporated remote management and monitoring, IoT control, advanced analytics, and multiple payment systems, ensuring seamless integration with customer systems such as CRM, BI, and more.



Accelerate your Digital Transformation

Optimize. Automate. Succeed.



www.ubiquity.pt | www.b2digital.pt