

# 为每位员工设计引人入胜的自动化体验

有人值守自动化峰会



# 演讲者



**喻杏**

UiPath售前顾问



**汪娟**

UiPath售前顾问



# 今日议程:

促进人机协作....

1  
“人机协作”  
给企业带来业务价值

2  
采用“人手一机”  
计划方案

3  
“人机协作”  
的工作方式

4  
人手一机  
企业案例

1

# “人机协作” 给企业带来业务价值



# 繁琐的工作会降低员工的工作效率和敬业度 -- 业务也会受到影响 Reboot™ Work.



员工在体力劳动上花费了太多时间

**67%** 的员工觉得他们不断地一遍又一遍地做同样的任务<sup>1</sup>



员工的工作效率较低且敬业度较低

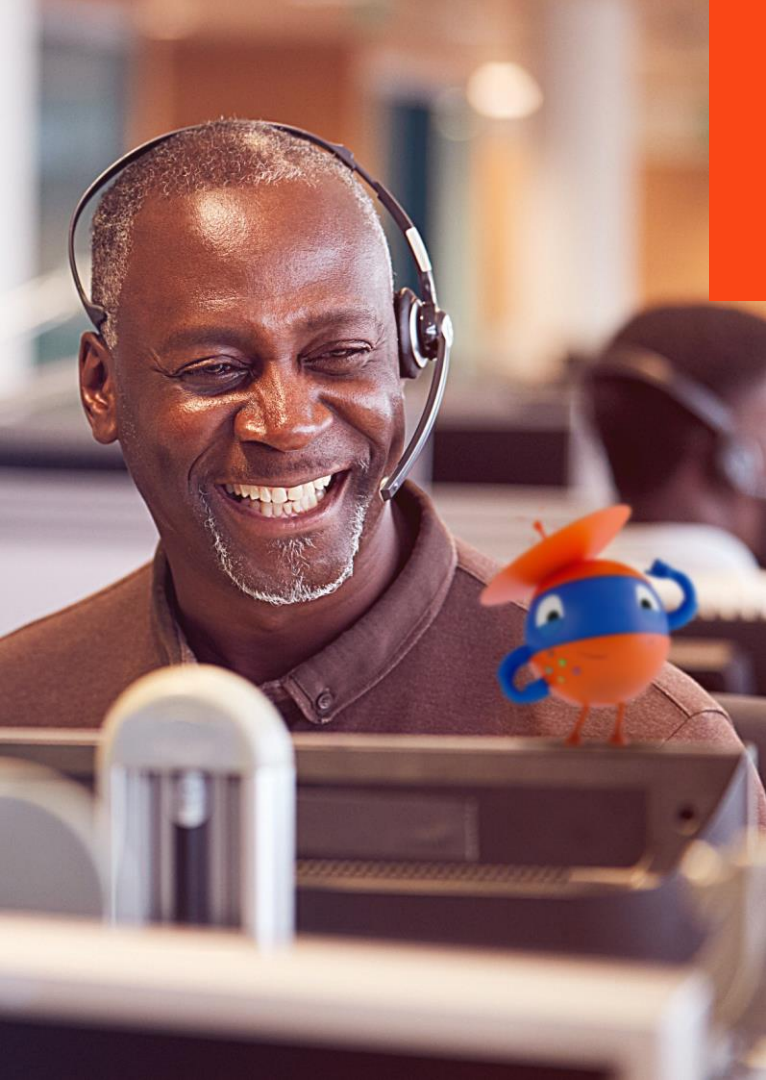
**48%** 每位员工每天的时间都浪费在繁琐的流程和组织上<sup>2</sup>



业务操作人员饱受重复乏味工作的困扰

**70%** 的企业员工认为他们无法有效地帮助客户<sup>1</sup>

1. [UiPath, Office Worker Survey](#)
2. [McKinsey, Welcome to the Digital Factory](#)
3. [Gallup, State of the American Workplace](#)



# 想象一下，如果每个员工都可以使用数字助理

## 让您的员工自由工作:



更快



更具创造性和协作性



具有更好的精确度



关于更高价值的任务

# 人们希望学习新技能并从事更高价值的工作 - 他们愿意接受自动化来提供帮助

86%

的员工愿意在未来使用自动化

79%

的员工对自动化感到满意

通过与机器人协作，员工期望<sup>1</sup>：

33%

更多时间用于关键任务/增值任务

27%

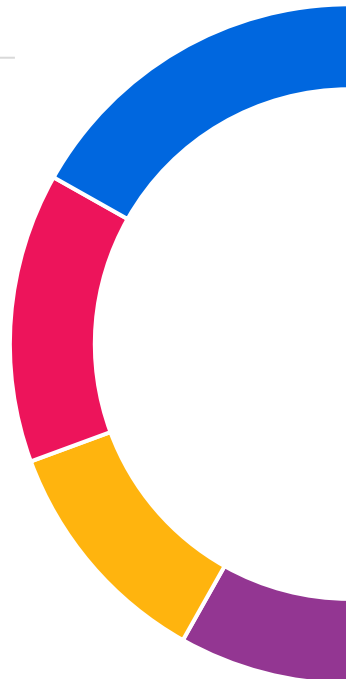
学习新技能（个人发展）

22%

学习新技能（专业发展）

16%

更多休闲/个人时间



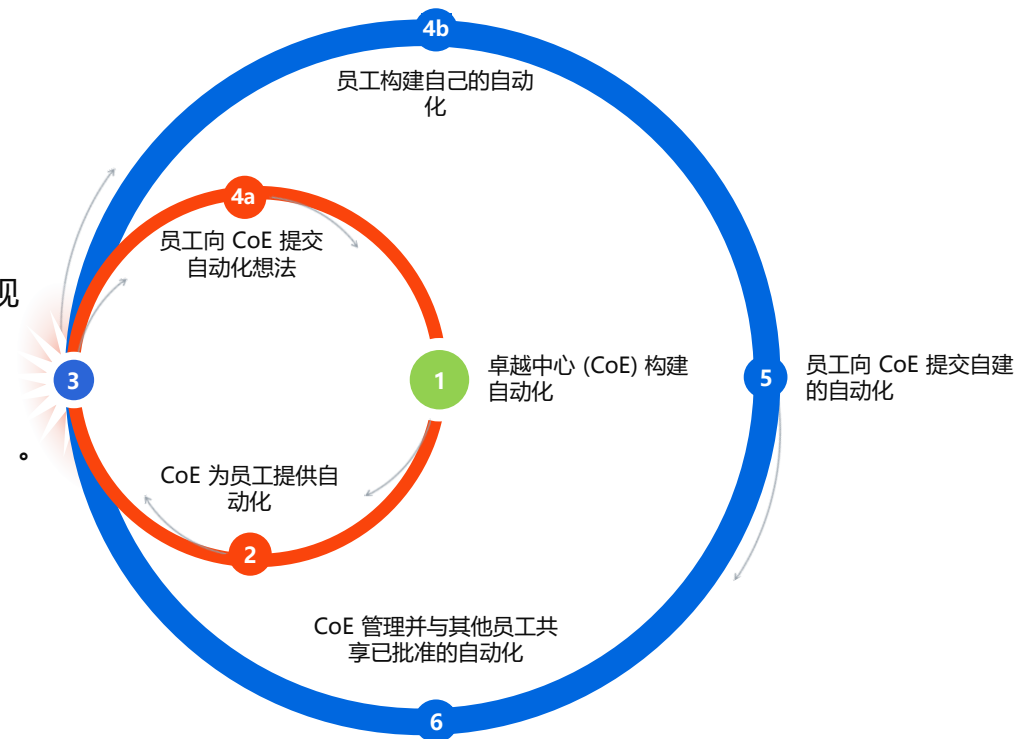
1. [UiPath and Bain and Company research, Overcoming the Automation Paradox](#)

# 自动化使用开启了持续的自动化飞轮

## 员工使用自动化

一旦员工开始使用自动化，就会出现突破性时刻：

- 他们可以向 CoE 提交自动化想法 (4a) 或构建自己的自动化 (4b)。



# 通过与机器人合作，员工可以节省时间——大规模释放产能

通过向一名员工提供数字助理来节省时间

为 15,000 名员工提供数字助理，预计可节省时间

240小时/年

360万小时/年



每天1小时  
每月20小时



# 鼓励人类使用机器人的公司看到了巨大的收益

**30-40%** 提高运营效率<sup>1</sup>

**30%** 降低成本<sup>1</sup>

## 额外增效<sup>2</sup>



**提高响应速度**  
更短的价值实现时间



**弹性**  
因为员工可以做出更好的决策



**减少重复性任务**  
能够将员工转移到战略工作中



**合规性和减少错误**



**提高吞吐量**  
无需雇用更多员工



**改善客户满意度**

1. [Everest Group, Smart RPA Playbook](#)
2. [IDC, A Robot for Every Worker: Are We Ready for a People-First Automation Mindset](#)

2

# 采用“人手一机” 计划方案



# 关于“人手一机”的采用计划方案

## 这是什么？

在 UiPath Apps 的支持下，采用计划框架使客户能够快速启动他们的用户和公民开发计划，并采用最佳实践和治理。

## 为什么需要？

从设计到基础设施，再到实施计划运营，启动一个致力于让每个人都能从自动化中受益的企业计划可能需要 16 周。采用计划框架使企业用户和公民开发人员计划能够在 4 周内启动。

## 主要优势

- 通过凝聚力、直观的体验，推动用户大规模采用和持续参与
- 提供轻松访问组织的自动化程序和指南并告知用户他们如何使用和创建自动化以及访问帮助机制
- 使 CoE 能够毫不费力地启动其计划，并获得规范性用户和公民开发人员旅程的支持，其中包括相关的最佳实践。

## Home

- > Recent
- > peter.cook@uipath.com's workspace
- > Apps unattended/COE10259\_UiPathDashboard
- > Global

## Apps

**C** CoE Automation Central  
By Razvan Nutica



**U** UiHealth Demo  
By Razvan Nutica

Run

**U** UiApprover  
By Andreea Simona Balan

**B** Bulk Email Sender  
By Andreea Simona Balan

Expressions Playground



Type here to search



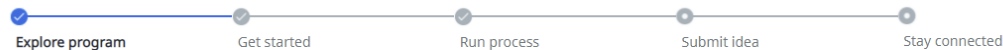
## UiPath Products



Document a task



Submit an idea



## 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

The true test of a UiPath employee is how well we use our own technology. With the UiPath Automation Center of Excellence (CoE) this is easy. Every day, the CoE receives new automation ideas from thousands of UiPath employees throughout the world. And every week, they bring them to life. Any employee can suggest ways to be more efficient, and frankly happier, with a robot.

[Take the 'Intro to RPA' course!](#)



## Program highlights

4941 Active users

1370 Hours earned back

531 Processes in use

[Get help](#)

## News

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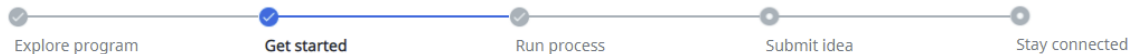
2/7/22

### 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<br>10:00 am EST  |
| <a href="#">Add to calendar</a>           |                         |
| RPA office hours - EMEA                   | 2/20/22<br>6:30 am EST  |
| <a href="#">Add to calendar</a>           |                         |
| Intro to RPA lunch                        | 2/22/22<br>12:00 pm EST |
| <a href="#">Add to calendar</a>           |                         |



## Do you want to...

### You requested UiPath Assistant!

You already requested access to run automations. If you haven't heard from IT in 3 days, submit a ticket via Get help.

[See video of Assistant in action](#)

Request Assistant



### Build and run automations

You will be able to run automations built by others and additionally, build and run your own automations.

[See video of StudioX in action](#)

Request StudioX & Assistant



## What to expect once you've requested your license:

1. Wait for an email notifying you to open up Assistant / StudioX.
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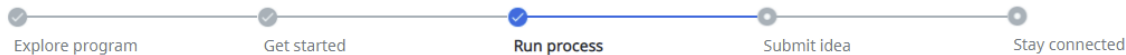
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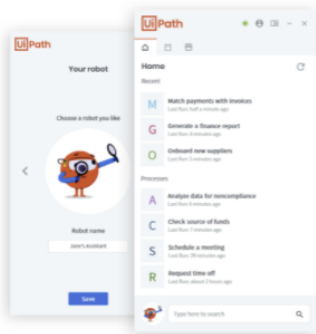
[Add to calendar](#)



## Ready to run an automation?

Use the Assistant to access and run all your automations available to you. Let it handle the tedious work for you. Give it a name, and off you go!

Launch Assistant



## Tips for using UiPath Assistant

Look for this icon in the Windows start menu to launch the Assistant without needing to come back here:



Browse the catalog of automations available to you in your Assistant. Click on a process to see its description.



Click on the play or run button and watch the automation take over your screen and do the boring work for you!



[Learn more about UiPath Assistant features](#)

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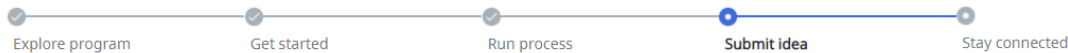
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## Have an idea for an automation?

The COE is looking for ideas to build that will drive impact amongst your peers as well. If you submit an idea that is personal to you, we encourage you to consider building it yourself.

[Submit idea to Automation Hub](#)



*I was drowning in paperwork, so I submitted an automation idea. Our CoE built a bot for me and now my colleagues and I are so much happier! So happy!!*

- Laura Kern HR rep

[See ideas submitted by UiPathers](#)

## Follow these steps to submit an idea in Automation Hub

- 1 Complete the high level assessment
- 2 Assign a process owner (it can be yourself)
- 3 Submit for review
- 4 Click on 'What's next?' inside Automation Hub
- 5 Open Task Capture to document process
- 6 Export Task Capture into Automation Hub idea

## Here are some good tips for candidate processes:

### Start Task

- Check Email
- Check Folder
- Check Website
- Check Task Queue
- Open Application

### Activities

- Download File
- Enter Data
- Read Data
- Manipulate Data (perform calculations, change format, edit data)
- If... then...

### End Task

- Upload File into Application
- Send email with updated attachment
- Send email notification once task completes
- Enter completed task into report

[Learn more about Automation Hub features](#)

## Program highlights

- 4941 Active users
- 1370 Hours earned back
- 531 Processes in use

[Get help](#)

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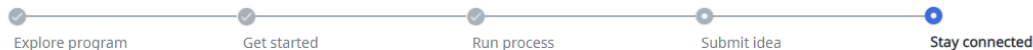
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## Personal stats



## Most active program participants

|    |                                             |
|----|---------------------------------------------|
| 1  | Roxana Iftime<br>266 automations run        |
| 2  | Cristina Stoicescu<br>261 automations run   |
| 3  | COE VM6<br>240 automations run              |
| 4  | Stefan Fiegert<br>173 automations run       |
| 5  | Tommy Fung<br>123 automations run           |
| 6  | Chethan Kashyap<br>98 automations run       |
| 7  | Mihai Gavan<br>95 automations run           |
| 8  | Adrian Iosif<br>92 automations run          |
| 9  | Razvan Nutica<br>91 automations run         |
| 10 | Prashik Dayal Bhujade<br>91 automations run |

## Most popular processes

|   |                                              |
|---|----------------------------------------------|
| D | Digital Briefcase Robot<br>479 runs          |
| G | Get Product Report for Accoun...<br>214 runs |
| V | Value Calculator<br>96 runs                  |
| T | Trial License Requester<br>86 runs           |
| P | Populate Customer Value Calcu...<br>74 runs  |
| D | Demo Bot<br>66 runs                          |
| S | Set Out Of Office<br>65 runs                 |
| U | UiApprover<br>64 runs                        |
| V | VE Financial Analysis<br>62 runs             |
| U | UiBank_AptLookup<br>43 runs                  |

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News

## Request a StudioX license

Follow the link to submit an access request to be able to build automations.

By selecting to build automations, there are a few more steps you'll need to complete, but you'll see them here in your path to success at the top of the screen.

By submitting a request for a StudioX license, you are agreeing to the following terms and conditions:

1. I will complete review of Program Central to understand all resources, tools, templates available to me.
2. I will use the idea assessment framework under Submit Ideas to ensure my process is within the guidelines for process suitability and stability before building my automation.
3. I will complete the training outlined in Build Automations prior to developing a process for production deployment.
4. I will complete required process documentation using UiPath Task Capture, and upload result when submitting an automation idea for approval.
5. I will not directly share my code with any other employees for purposes of using the automations.
6. I will not misuse UiPath StudioX to build automations against IT Security rules..
7. I will only execute automations available from UiPath Assistant.
8. I am responsible for the accuracy of the execution of executed automations. I will verify the results to the extent possible. After the automation is executed, I will verify the data check-points and other accuracy verification/validation steps.
9. I will use the help button if I need assistance.
10. I understand that my failure to adhere to any of the above requirements may result in disciplinary action up to and including dismissal.

Cancel

Confirm



## Learn how to make the most out of the program!

### Introduction to RPA

This automation basics course is your entry into the world of RPA and automation.

[Ready to learn](#)

☒ I have completed this course

### Build your Automation

Building automations should be easy, even for those without coding experience.

[Ready to learn](#)

☒ I have completed this course

### Deploy and Run Your Automation

We will cover how to publish UiPath StudioX projects and run them from your Assistant.

[Ready to learn](#)

☒ I have completed this course

\*Check the associated box after completing each course.



We strongly recommend that you complete your training before building any automations.

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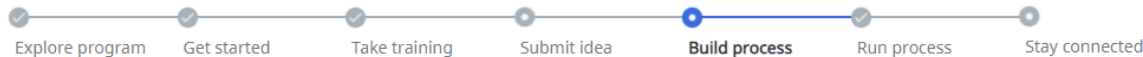
[Add to calendar](#)

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[Add to calendar](#)

Intro to RPA lunch 2/22/22 12:00 pm EST

[Add to calendar](#)



## Follow these steps to build every automation

### 1 Step 1 - Approval

Get your automation approved in Automation Hub

### 2 Step 2 - Write your code

Build automation against best practices guidelines

### 3 Step 3 - Code review

Pass Workflow Analyzer

### 4 Step 4 - Publish

Publish automations

## Ensure your idea has been approved before you start build your automation

You will receive your idea approval notification via email. Please expect 1-3 days. Once you've received the approval email you can start building your automation idea by following the guidance on the left side.

If your idea was rejected, it may be due to these following reasons:

- Does not comply with what a citizen developer is allowed to develop
- High level assessment score is too low and at risk of being very difficult to build
- Idea is better suited for the COE to build as the benefit can impact the rest of the company

The COE will follow up with you, but we hope you continue to think of other great ideas to build!

[Check out other citizen developer ideas](#)

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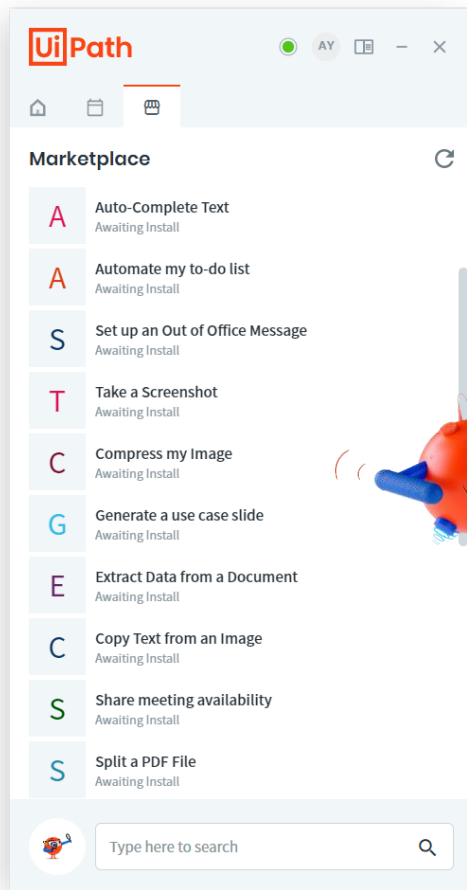
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# NEW: 从UiPath Marketplace轻松访问现成的自动化



**Supported by Publisher**

**Take a Screenshot**

Pre-Built Automation

A simple attended automation user to snip a portion of the screen is then copied to the clipboard.

☆☆☆☆☆

**Bronze Certified**

**Supported by Publisher**

**Automate my to-do list**

Pre-Built Automation

**Supported by Publisher**

**Share meeting availability**

Pre-Built Automation

A quick and simple way to find schedule availability for multiple people at once!

☆☆☆☆☆

48

**Supported by Publisher**

**Auto-Complete Text**

Pre-Built Automation

Leverage the Auto-complete text attended automation to streamline your communication by rapidly replacing text in...

☆☆☆☆☆

90

**Bronze Certified**

**Supported by Publisher**

**Split a PDF File**

Pre-Built Automation

This attended automation quickly splits multi-page PDFs into individual single-page PDFs.

☆☆☆☆☆

61

**Gold Certified**

3

# “人机协作” 的工作方式



# 释放无限潜力：成为全自动化企业™



## 将可自动化的工作分配给机器人

机器人做平凡且可重复的工作

- 贷款业务
- 账户维护
- 交易后操作
- 数据核对
- 反洗钱/KYC
- 客户入职
- 商户收购
- 欺诈和纠纷



## 为公司中的每个人提供一个机器人

机器人助手增强和增强人类工人的能力

- 呼叫中心
- 银行分行
- 风险与合规分析师
- 财务顾问支持
- 贸易运营分析师
- 卡运营助理
- 内部审计团队



## 民主化 开发和使用

工作人员可以使用低代码应用程序  
自动执行简单任务

- 财务分析师
- 投资银行家
- 投资研究
- 数据和分析团队
- 中台团队



## 在工作的各个方面释放 AI

部署 AI 以构建更智能的机器人  
并发现每一个自动化机会

- 客户服务
- 密码箱处理
- 中小企业贷款
- 抵押贷款发起
- 贸易交易采集
- 负面新闻筛选

完全自动化的企业让人们可以专注于更高价值的工作



# 员工在日常工作中使用自动化的 5 种方式

1

## 将工作交给机器人

一名员工启动机器人。  
机器人控制员工的键盘和鼠标来完成任务。

2

## 与机器人一起工作

机器人启动员工桌面的副本，并在员工继续工作时  
在后台运行。

3

## 在机器人运行之前、之后或期间与 机器人互动

当机器人执行一项任务时，它会循环让员工做出决定、  
发布批准或进行进一步分析。

4

## 自动触发机器人

机器人监视员工桌面上发生的特定操作。  
当操作发生时，它会自动开始在后台运行。

5

## 与运行并相互响应的机器人协作

机器人可以触发其他机器人完成操作。  
机器人协同工作可以有效地完成员工的任务之一。

## 有人值守自动化



# 有人值守的机器人和人类如何协同工作

从简单的“Hands-Off”流程到跨流程和系统的混合自动化，UiPath 提供了一个强大的工具包，使开发人员能够创建自动化体验，以实现其特定的业务目标。



## Hands-off

用户根据需要启动自动化，机器人通过控制用户的键盘和鼠标进行工作

[UiPath Assistant](#)  
[Connectors](#)  
[REST/SOAP API](#)  
[Report Status](#)  
[Credential Management](#)

## Side-by-side

自动化在幕后运行，而用户保持对鼠标和键盘的控制

[Picture-in-Picture](#)  
[Simulate Type / Click](#)  
[Send Window Messages](#)  
[Block User Input](#)

## Interactive

在机器人运行之前、之后或期间与机器人互动

[Apps](#)  
[Forms & Callouts](#)  
[Input Arguments](#)  
[JavaScript SDK](#)  
[Inject JS](#)  
[Reminders](#)

## Event-driven

机器人监视员工桌面上发生的特定操作。当操作发生时，它会自动开始在后台运行。

[Background processes](#)  
[Triggers](#)  
[Auto-download](#)  
[Invoke Process](#)

## Interconnected

自动化流程相互协调集中运行并相互响应

[Inter-process comm.](#)  
[Hybrid Automation](#)  
[Orchestrator Queues](#)  
[Custom Widgets](#)

# 有人值守的机器人和人类如何协同工作



## Hands-off 将工作交给机器人

用户根据需要启动自动化，机器人通过控制用户的键盘和鼠标来工作

- [UiPath Assistant](#)
- [Connectors](#)
- REST/SOAP API
- Report Status
- [Credential Management](#)

# UiPath Assistant

## 1 从"开始"菜单本地运行助手



UiPath Assistant

## 2 连接到Orchestrator

1. 打开Orchestrator Configurations
2. 选择连接类型
3. 进入计算机键值: Orchestrator URL或服务URL
4. 单击"连接"或"登录"

[Click here for more information](#)

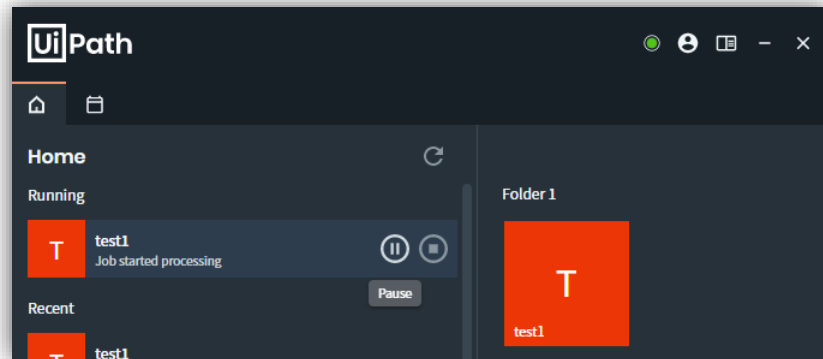
## 3 检查连接状态

系统托盘图标



[Click here for more information](#)

## 4 运行有人值守的自动化



注：步骤 1-3 可能会在用户登录时自动执行，具体取决于系统配置

# UiPath Assistant – Process Widget

通过Orchestrator方式连接并获得许可



默认和自定义微件

其他配置的设置

最近的流程

收藏夹

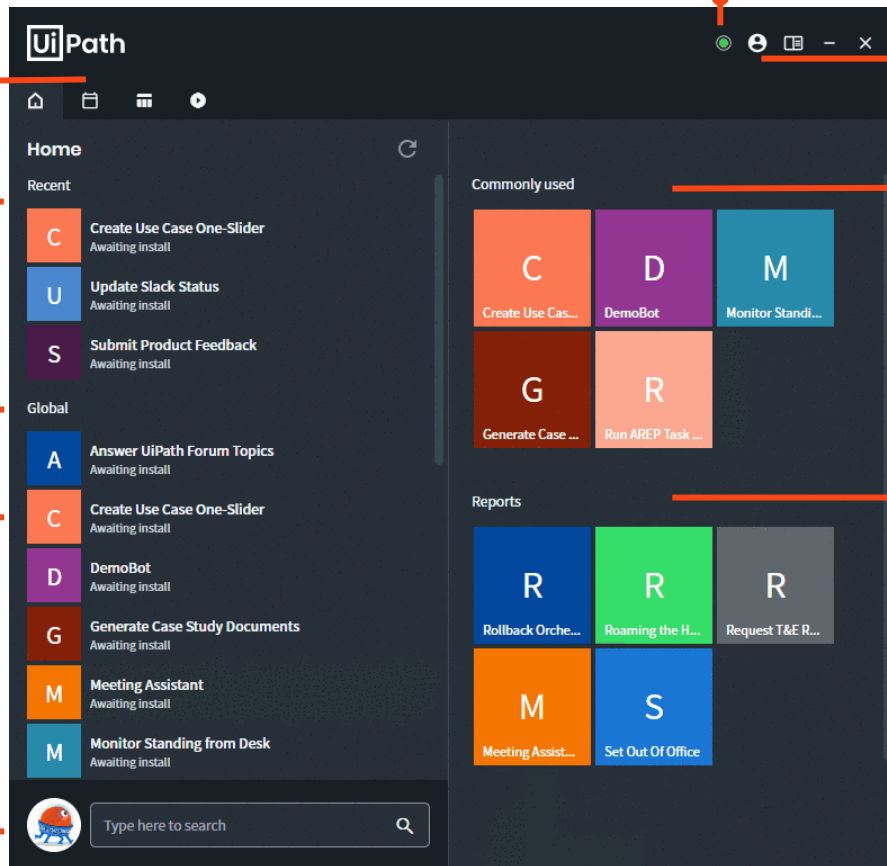
按工作区组织

启动板

流程列表

自定义组

轻松查找流程



# 有人值守的机器人和人类如何协同工作



## Side-by-side 人机同时工作

自动化在幕后运行，而用户保持对鼠标和键盘的控制

- Picture-in-Picture
- Simulate Type / Click
- Send Window Messages
- Block User Input

Hands-off

Side-by-side

Interactive

Event-driven

Interconnected

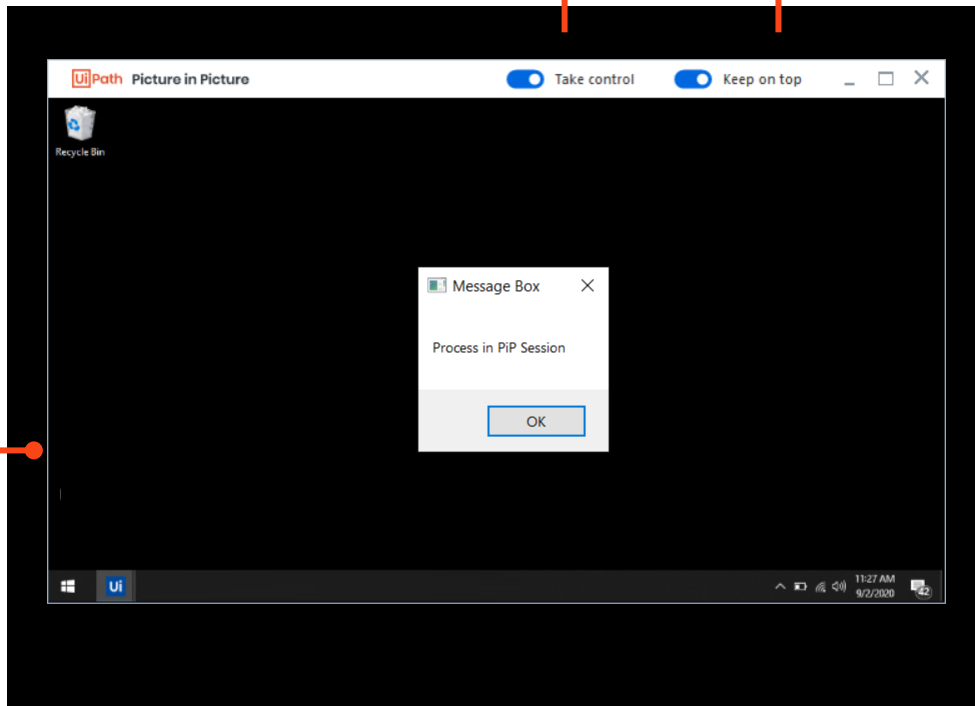
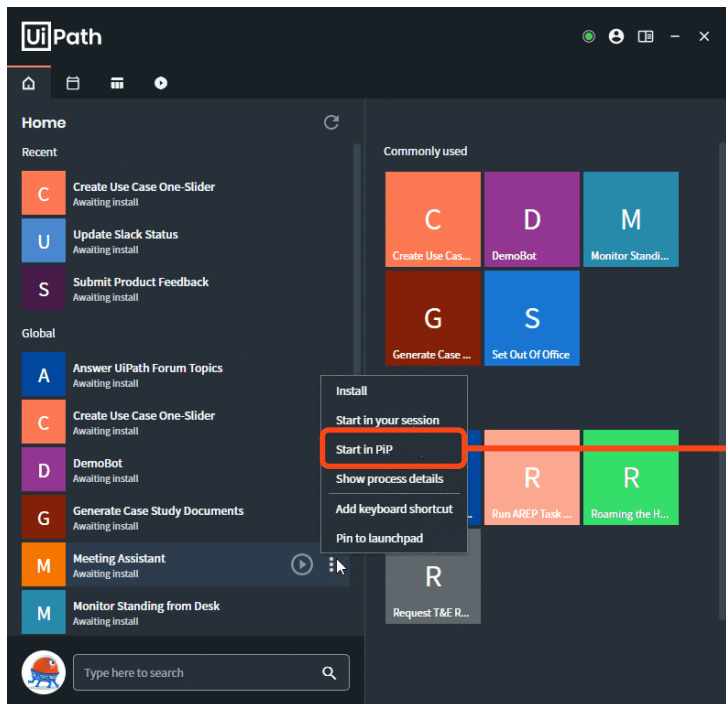
# UiPath Assistant – Picture in Picture

在独立的 Windows 会话中与机器人协作运行有人值守的流程

[Click here for more information](#)

获取控制

保持屏幕



# How Attended Robots and Humans Work Together



## Interactive 人机互动式交互

用户在执行之前、期间和/或之后参与自动化

- [Apps](#)
- [Forms & Callouts](#)
- [Input Arguments](#)
- [JavaScript SDK](#)
- [Inject JS](#)
- [Reminders](#)

Hands-off

Side-by-side

Interactive

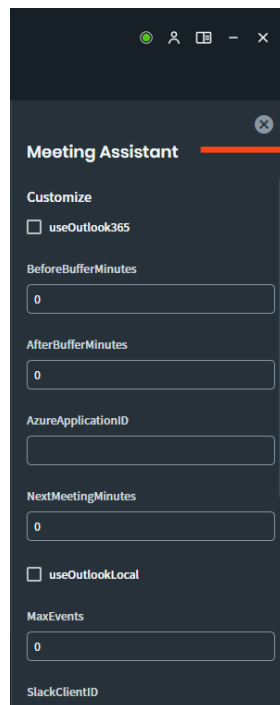
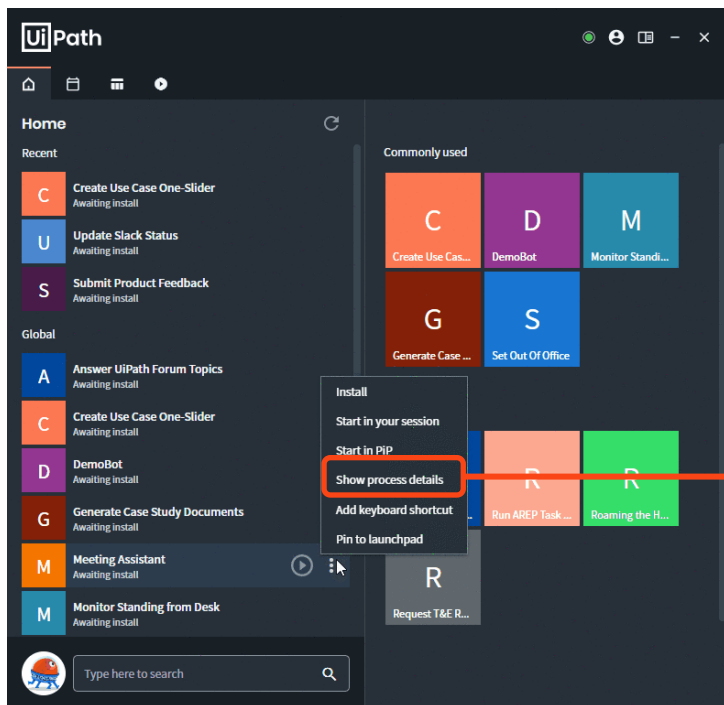
Event-driven

Interconnected

# UiPath Assistant – Process Details

用于配置使用输入参数的进程

[Click here for more information](#)



流程名称

自定义选项

输入参数Input Parameters

# UiPath Assistant – Reminders Widget

## 1 创建提醒

**Add new reminder**

Select Process

Select Frequency

Time: Start date:

Save Cancel

选择流程

选择频率

选择时间日期

保存提醒

创建新提醒

## 2 查看/编辑计划提醒

UiPath

Reminders

Add new reminder

Input Arguments Process  
today at 3:41 PM

Edit reminder

Selected Process

Select Frequency Every:

Time: Start date:

Save Cancel

编辑/删除提醒

## 3 提醒通知

Reminder

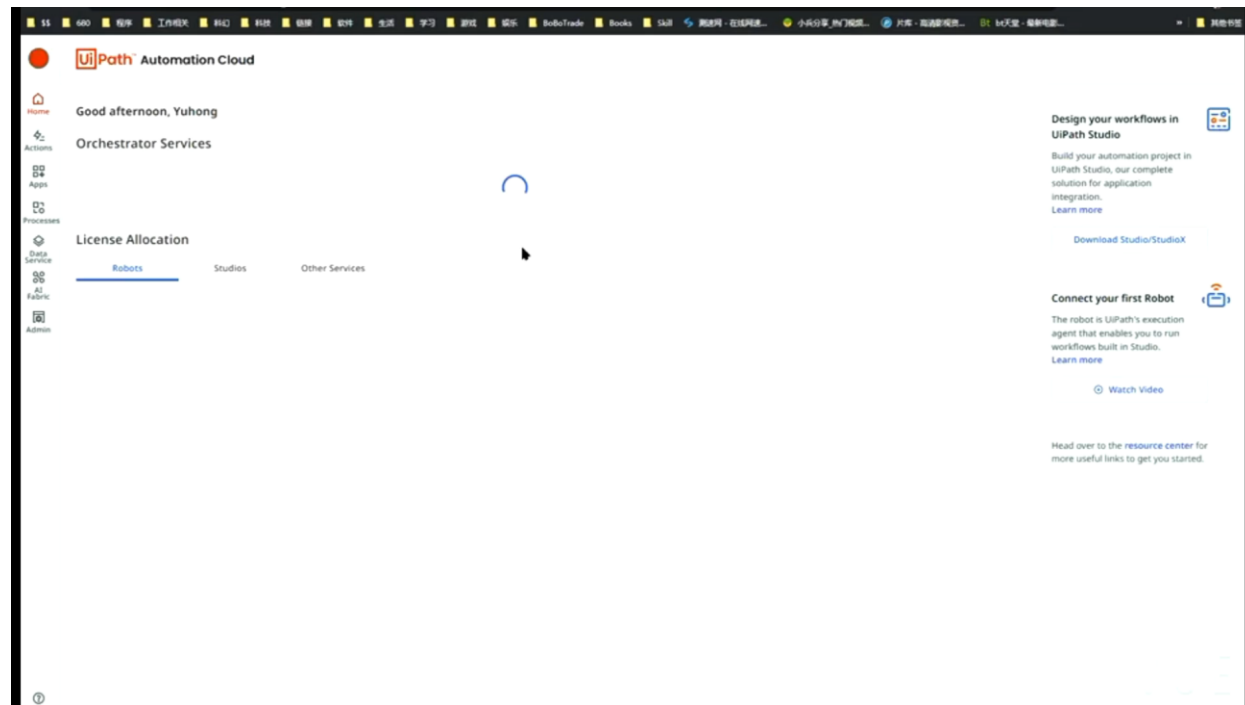
M Meeting Assistant  
Global

⌛ × ▶

启动流程

休眠/关闭提醒

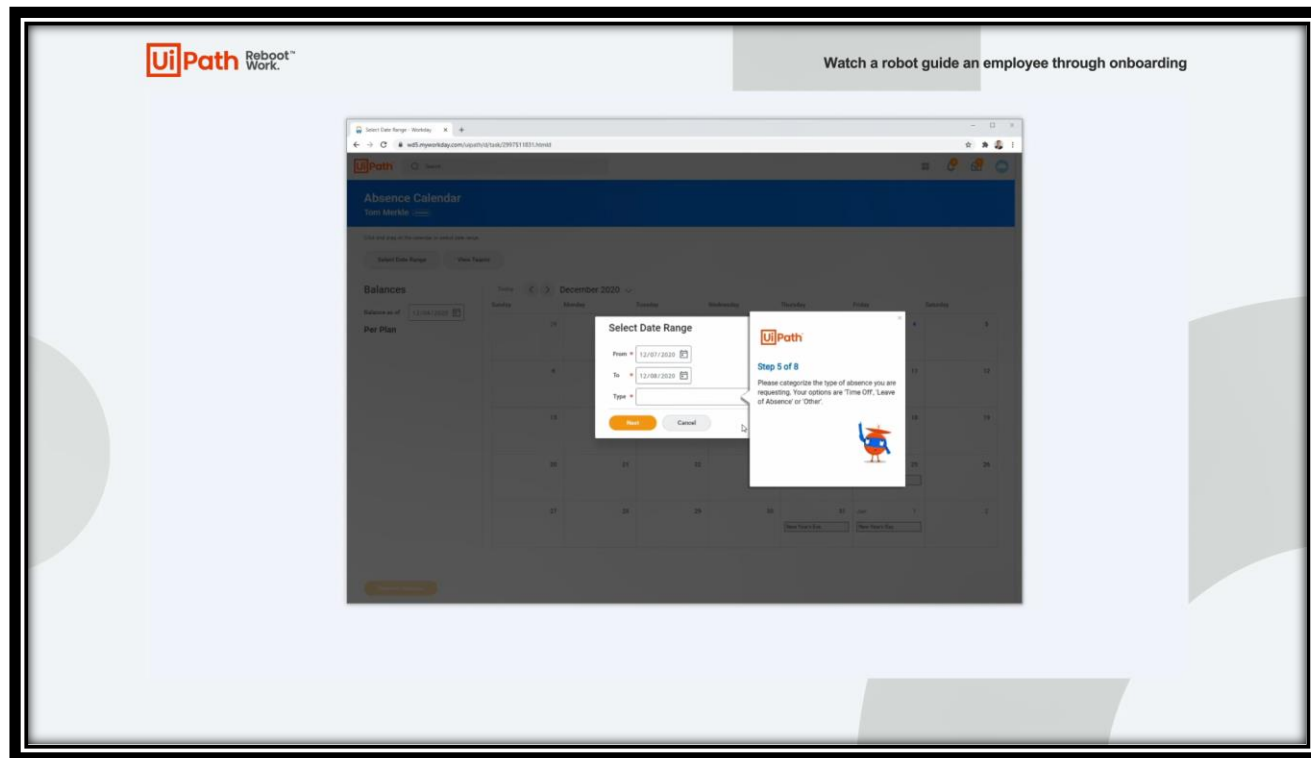
# Apps



## 功能

- **UiPath Apps** 是一个基于云的低代码应用程序开发平台，使您能够构建和共享企业级自定义应用程序，从而提供引人入胜的用户体验。
- 使用 UiPath Apps，您可以快速构建自定义业务应用程序，这些应用程序使用自动化的强大功能连接到任何底层云或本地系统中的数据。
- 使用 **UiPath App Studio** 构建的应用程序为数据访问和更新提供了丰富的控件，并为复杂的业务需求提供了条件逻辑。
- 底层的 UiPath RPA 平台提供高级工作流和业务逻辑功能，可自动执行整个端到端业务流程。

# Triggers & Callouts 引导式自动化



callouts 引导员工了解 HR 流程

Trigger based 引导式自动化

# Robot.js with Excel Add In

## JavaScript SDK for Robot

### (UiPathRobot.js)

允许您在上下文中将本地有人值守的机器人直接嵌入到现有应用程序中。

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# How Attended Robots and Humans Work Together



## Event-Driven 事件触发式交互

自动化在用户每天工作时自动启动

- Background processes
- Triggers
- Auto-download
- Invoke Process

Hands-off

Side-by-side

Interactive

Event-driven

Interconnected

# Background Process



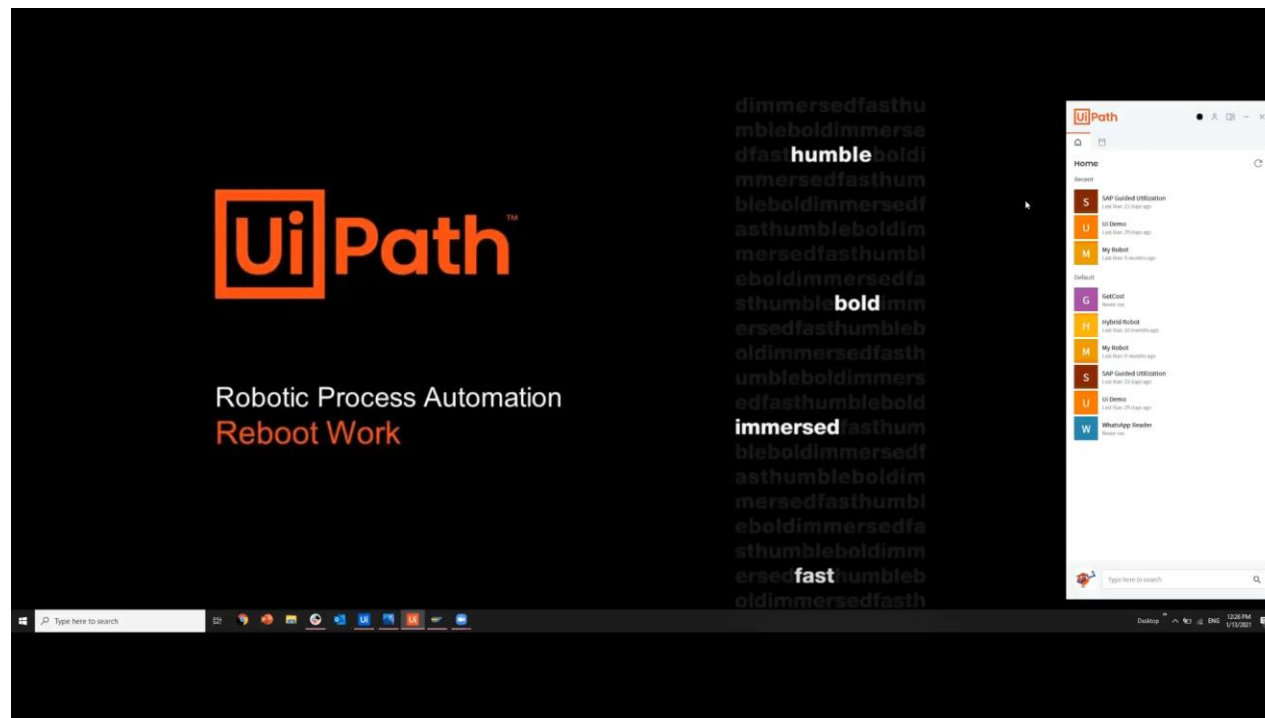
## 功能

- 一台机器人可以运行多个Background Process（后台流程）和一个Foreground Process前台流程。

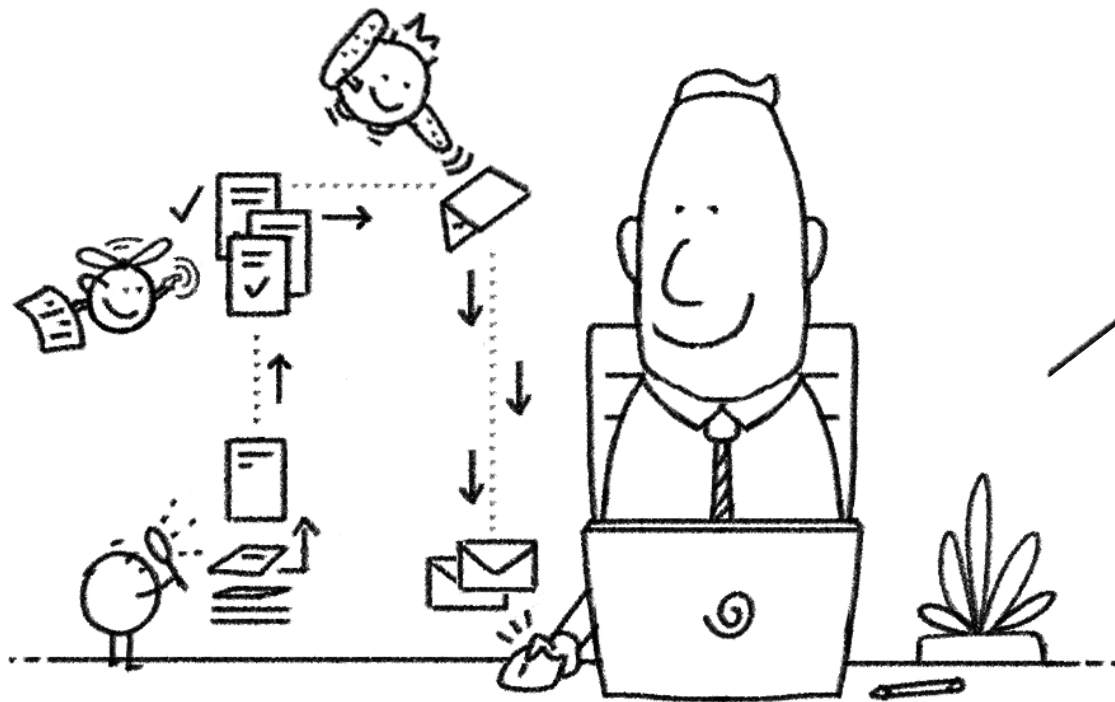
# Desktop Trigger

## 功能

- 根据用户的操作和其他桌面触发器自动开始工作，从而更快地获得结果。



# How Attended Robots and Humans Work Together



## Interconnected 机器人响应式交互

机器人可以触发其他机器人完成操作。机器人协同工作可以有效地完成员工的任务之一。

- Inter-process communication
- Hybrid Automation
- Orchestrator Queues
- Custom Widgets

Hands-off

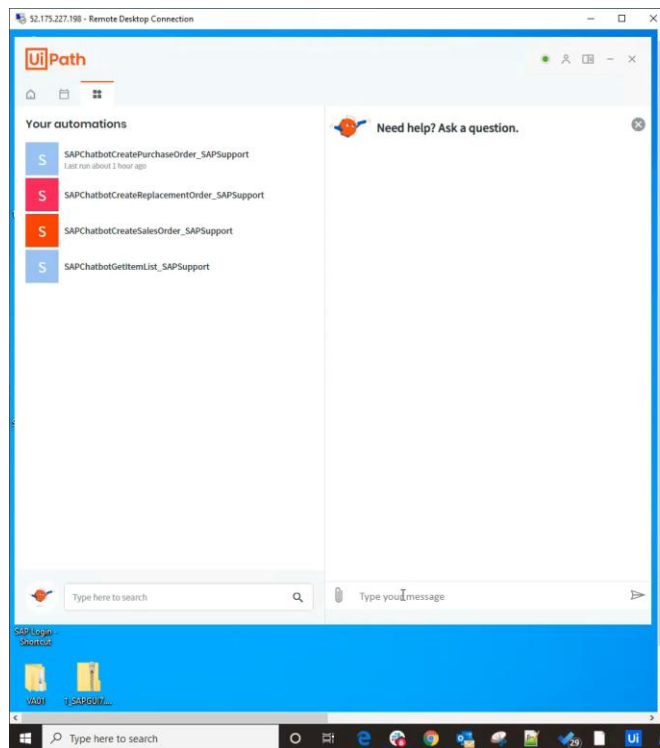
Side-by-side

Interactive

Event-driven

Interconnected

# Assistant Chatbot Widget



## 功能

- 我们知道，每家公司都有自己独特的任务和商业模式，需要通过解决它们的工具来适应这些任务和商业模式。我们也知道，有时很难找到完全符合您公司需求的软件。
- 为此，您现在可以构建自己的 Widgets，以充分利用 UiPath 助手来自定义自动化并提供更好的整体体验。

# 4

## “人手一机”的企业案例



# 案例1 :投资银行

## 挑战

- 初级银行家难以在多个 IB 服务台和团队中创建与交易相关的主动演示，导致工作时间长、生产力低下和员工体验差。
- 一些例子包括准备推介幻灯片，交易组合，公共信息书籍，格式化收益模型等。

## 解决方案 (sample Citizen Dev Automation)



分析师从宣传册模板数据库中选择要创建的幻灯片（例如，标题幻灯片、上限表、同行交易、所有权摘要等）



分析师根据从数据库中选择模板输入必填字段（例如，要分析的公司、同行、日期范围）



机器人导航到不同的数据源（FactSet、Cap IQ、网站等），将数据和格式提取到 PowerPoint 模板中



Robot 将所有已完成的模板编译成单个文件，调整格式并保存到桌面以供分析师审查

## 结果



**65%**  
减少手动操作



流程从每本宣传手册超过 1.5 小时减少到 30 分钟以下

# 案例2：卡中心联络中心

## 挑战

- 客服人员切换八个应用程序、输入复杂的按键命令、阅读法律脚本并做笔记，同时尝试与客户交谈。
- 在呼叫期间，事务可能会失效，但代理可能不知道，然后会花时间执行需要重复的操作。
- 结果呢？高AHT，低NPS，工作人员流失，以及代价高昂的错误。

## 解决方案

- 座席将信息输入到其桌面上的自定义座席控制台，UiPath 机器人代表座席工作以完成任务。
- 机器人在交易无效时实时提醒工作人员。

**“创建自动化的速度至关重要，UiPath解决方案提供了快速自动化的能力，同时满足我们的高标准。”**

**Cheryl Watson** • EMEA Lead, RPA Centre of Excellence, Fiserv

## 结果



**20%**  
减少 AHT



**10%**  
改进 in NPS



**20%**  
降低培训成本

net promoter score净推荐值

# 案例3 :大型银行企业学院

## 挑战

- 客户有一个既定的集中式的RPA计划
- 然而，集中式操作模式不利于解决更简单/长尾的自动化问题
- 员工体验差，尤其是在精通技术的运营和业务用户方面

## 解决方案

- 为全行公民开发人员建立自助服务企业学院
- 向多个运营国家/地区的所有部门和职能部门开放
- 最初的超级用户包括来自零售、批发和证券的团队



## 结果



1200

已注册的业务用户



150%

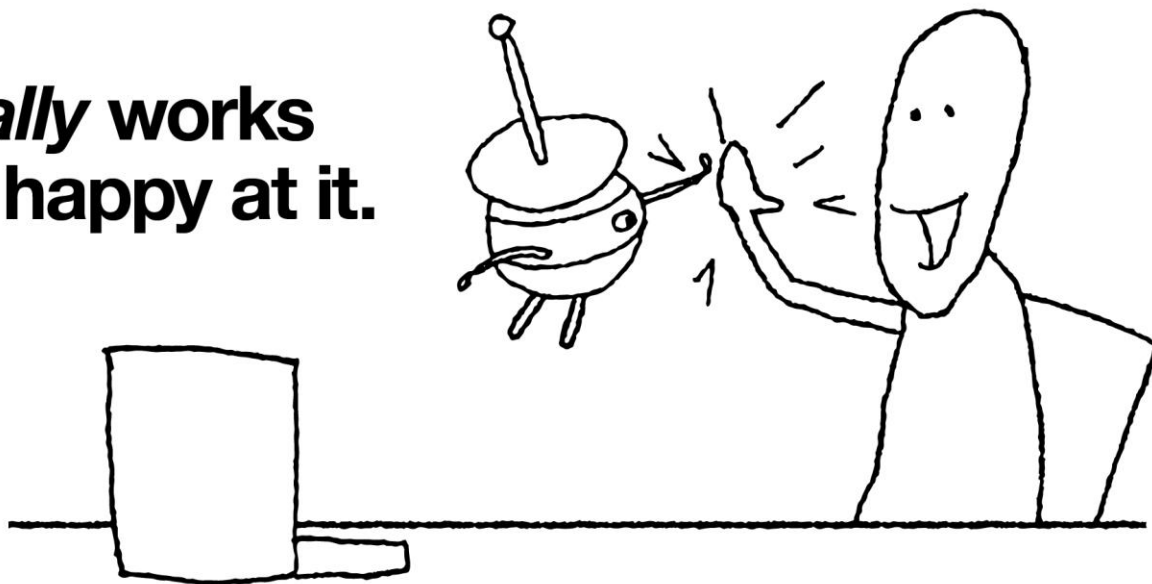
ROI



97%

毕业率

**Work only *really* works  
when we are happy at it.**



**谢谢大家!**

**Work is history. It's time to reboot work.**