

Strategic Automation at Scale: Unlocking Value with UiPath Automation Hub and Insights

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Abstract

This research paper examines the features of UiPath Automation Hub and the UiPath Insights platform, with a focus on the importance of tracking and measuring automation KPIs, which are crucial for evaluating the return on investment (ROI) of the implementation. Automation Hub enables users, ranging from product owners to managers, architects, business analysts, and developers, to collaborate and contribute to mapping information at each phase of the automation process, starting from the ideation phase. UiPath insights, on the other hand, help track performance monitoring and ROI tracking through embedded analytics. Both products facilitate the creation of data-driven automations, increase transparency, and enhance decision-making for strategic automation initiatives at the enterprise level. As organizations expand their automation pipeline and capabilities, visibility and control over the pipeline and deployed automations are necessary for strategic scaling. UiPath Automation Hub enables to source automation ideas from across the business unit or organization, providing a structured platform to identify, track and assess the submitted opportunity. Additionally, this product can capture different stages of the idea, including deployment. UiPath Insights enables users to create robust, data-driven insights from the data of deployed automations, allowing them to track the performance of deployed automations and real-time metrics that help assess the actual ROI generated and the ROI envisioned. The rapid evolution of RPA opportunities creates a need for comprehensive management of automation ideas and efficient monitoring of robot performance. This paper focuses on how UiPath Automation Hub and UiPath Insights facilitate tracking of ideas and performance monitoring.

Keywords: Process Assessment, Discovery Phase, AI, Process Mining, Task Mining, Task Capture, Automation Hub, ROI, Jira

1. Introduction:

UiPath Automation Hub is a collaborative process that lets users contribute to process ideation and pipeline management, accelerating the implementation of RPA across the firm[1]. Key features of UiPath Automation Hub include identification of process that lets users share ideas through a collaborative process identification tool, management of pipeline that enables changing status of ideas as per the progress, documentation repository that allows users to save files corresponding the candidate for automation, and integration with Task Capture that helps to get insights from automation candidates. It can be accessed from various web browsers, including Google Chrome, Microsoft Edge, Mozilla, and

Safari. Any browser other than the one provided is not supported, as certain features may not function properly, or errors may occur when accessing the Automation Hub web page. Using roles, user access can be controlled. There are different roles, including account owner, system admin, RPA sponsor, and component creator. Program manager, idea approver, authorized user, standard user, citizen developer self-user, citizen developer power user, business reviewer, and technical reviewer. The features and options available to each user will be discussed in this paper. This paper provides an overview of the workspace, which enables users to check the status of submitted ideas or automations, as well as the various types of dashboards available. Additionally, the integration of Automation Hub with UiPath Insights is explored.

UiPath Insights is a web application that helps navigate through the operation and business metrics. This is done by using data-driven and analytics-powered dashboards. Specific templates provided by UiPath will already be available in the tenant. At the same time, there is an option to create a customized dashboard from scratch or modify existing templates after copying them to user dashboards. Certain key performance indicators will be crucial for the organization, and they can be visualized across the company's automations. By default, every user will have access to templates related to Robots and Machines, Processes, Queues, and Attended Reporting. However, Business ROI and Business ROI Queues templates are by default locked unless an administrator adds the ROI dataset and grants the necessary permissions to a user. Like in the Automation Hub, user privileges can be customized in UiPath Insights. The roles of Viewer, Designer, ROI Viewer/Editor, and Admin are available. Also, a group of users can be granted access using Active Directory integration[2]. The three layers of UiPath Insights dashboard including data layer, visualization layer, and filter layer are discussed in this paper. This paper discusses the features in UiPath Insights, including available templates, ROI Dataset, Dashboards, Custom Variables, Alerts, and schedules.

2. UiPath Automation-Hub:

a) User Interface and Permissions:

The navigation menu at the top of the page, after signing in, can vary depending on the user's role. The goal of the user onboarding process is to make users comfortable using the platform and obtaining value from it. This process is split into two parts: user onboarding and feature onboarding. Using user roles, customized roles can be assigned to the users. By default, the standard user role will be assigned to all newly created users. The platform allows users to offer secure layers in the tenant by customizing control, at a granular level, over each category and action type, enabling admins to control which categories users can access in terms of creating, viewing, editing, and managing ideas and components in the Automation Hub. Details about each role are available at Admin Console > Manage Access > Roles. The default roles cannot be edited, deleted, or disabled because they are integral to the functioning of Automation Hub. A user can be assigned multiple roles, and each category of action can be customized to reflect the type of access the user is intended to have. The first user is automatically assigned the Account Owner role, granting them the ability to edit the Tenant settings page. System Administrators can view and edit everything within their instance and are primarily responsible for managing users and platform configuration. RPA sponsors will have read-only access, allowing them to view ideas, components, and in-built dashboards and

reports. Component curators are responsible for curating the flow of reusable components within the platform. Program managers can view, edit, and decide which ideas progress towards the implementation phase. Idea approvers identify duplicates and approve ideas for a detailed assessment. Authorized users are subject matter experts, business analysts, process owners, and process consultants who possess in-depth knowledge of the process and have access to submit ideas in Automation Hub by completing detailed assessment fields. Standard users have access to submitting ideas and exploring the pipeline. By default, all users for whom the account is created will have standard user permission. The Citizen Self Developer license helps automate simple tasks or activities for the user's use and allows sharing of automations. A Citizen Developer power user automates low-risk, simple to medium-risk tasks and activities for users within the department. The Business Reviewer and Technical Reviewer roles facilitate the advancement of automations created by Citizen Developer self-users. The Business Reviewer selects which automation is worth a technical review, identifies code quality issues, and approves automations for large-scale consumption. Collaborator roles are available to provide collaboration among users for a submitted automation idea. A user must already exist for the admin to assign the collaborator role. Details about each Collaborator Role and its designated permissions are available on the platform by accessing the Admin Console > Manage Access > Roles > Collaborator Roles. Admins can edit the permissions for collaborators, but cannot delete their roles, as these roles are essential to the functioning of Automation Hub. For example, Employee Idea Submitter, COE Idea Submitter, Process Owner, Project Manager, Citizen Developer Submitter, Citizen Developer, Process Mining Submitter, Task Mining Submitter, and Change Request Submitter. However, certain roles can be deleted, customized, or disabled for each tenant based on specific requirements. Such roles are Business Analyst, Solution Architect, and RPA Developer. The primary difference between the role and the collaborator role is that the role grants access to specific features and components within the tenant. In contrast, the collaborator role provides editing permissions from the profile of a particular idea. Let's suppose users X, Y, and Z exist in an organization, and there are projects A, B, and C. Users X, Y, and Z are assigned standard roles and assigned the Business Analyst role. Also, they are added to the Business Analyst group by assigning them the 'Business Analyst' collaborator role in their user account. They can be added as collaborators to automation projects to cover the analysis phase. The expertise of Business Analyst A is required for project C. The Project Manager searches for user X and adds them as a collaborator for project C, with the role of Business Analyst, giving them the option to edit the profile of automation project C. However, at this point, user X will not have access to other automation project profiles, including A and B. Once Business Analyst Y is added as a collaborator to project B, user Y can make contributions to idea B but will still be unable to edit or contribute to projects A or C. Hence, while the user has access to edit the profile for the automation profile to which they're added, they cannot edit other project ideas to which they're not added.

b) Admin Console Overview:

The company details page displays the account owner's name and email address, company name, and URL, all of which are non-editable fields. It also features the company logo, which the account owner can update. The license section describes the tenant's current plan and expiry date. When a license expires, both for trial accounts and enterprise accounts, the license is demoted to community, restricting usage to a single tenant if multiple tenants were created. The services available under a

community license will be accessible to that tenant. The data in the Automation Hub isn't deleted after the license expires, but it is restricted and can't be accessed. Once the license is renewed, the service must be re-enabled. With the support ticket, changes in the company name, logo, or account owner can be updated. Email reminders can also be configured to ensure process ideas are not stuck, prompt action from stakeholders, and enforce timelines for each stage in the automation life cycle. By default, the toggle is off, and it needs to be turned on. Tasks created after email alerts are enabled can be notified, but tasks created before email reminders are enabled will not be notified [3]. Email reminder interval to configure the time interval to re-send an email, and number of email reminders if a task is incomplete can be customized based on need. If a task remains unprocessed, all approvers participating in the approval process for an idea will receive email notifications. Once any of the approvers processes the task, it is considered done. Audit logs help the tenant system administrator review user actions and can be downloaded as a CSV file. The types of audit logs are event log, open API, tenant service, and object reference. The event log contains information related to all events, including who performed them and when they occurred. Open API has a list of API calls performed on the Automation Hub open API service. Tenant Service lists all API calls performed on the Automation Hub instance. Object reference lists all API calls that are too large to be displayed using Open API or Tenant Service. By default, Audit logs are stored in the system for 30 days. The Assign Roles page lists all users assigned to the tenant, along with their different statuses. Active states that user registration is complete in the tenant and the user has been successfully connected to Automation Hub. Any user with a pending status means that their registration isn't yet complete, and they will not have access. Inactive status appears for users whose access was revoked. The system offers to apply one or more roles a user account to customize access to each component in the Automation Hub. When the admin chooses to grant a user access to only a specific category, permission delimitation occurs. For example, suppose a user is added as an idea approver for the Human Resources category. In that case, the user will be able to view, share, review, and assign a process owner only for the ideas under the Human Resources category. A collaborator's role allows a user to be assigned to multiple categories for collaboration. For example, the architect will be added to all categories to contribute across departments, and developers will be added as collaborators to specific categories where they build automation. By default, there are five categories, and the admin can add up to 50 categories. Assessments can be customized to tailor the results to the target audience and get relevant KPI indicators. The admin role and the role with permission to customize can perform customization of the assessment. The following assessments can be customized [4]: overview assessment, high-level assessment, detailed assessment, citizen developer assessment, change request assessment, execution assessment, and miscellaneous assessment. There are four options in the admin page of customize assessments: start fresh, which starts a new assessment without using fields from previous assessments, copy existing, which starts the customization from existing assessment, default assessment, which has default fields provided by UiPath assessment, and upload, which lets us upload a template file for assessment. Assessment versions that are part of any idea and are currently being used are marked as Live.

c) Workspace overview and features:

The Workspace section allows users to view and contribute to automation ideas and development within the organization. Some of the options available in the Automation Hub include checking the

status of automations, uploading components, and reviewing automation ideas. Automation Pipeline lists all the ideas and automations within the tenant. My Submissions section contains ideas that are either in the submitted stage or in the draft stage. My collaborations section contains ideas where the user is added as a collaborator. The My Components section contains all the components that the user has uploaded or downloaded. [5] Overall, Automation Pipeline is a visual and interactive way to manage the lifecycle of automation ideas. At the Review stage, triage and assessment of submitted ideas take place. This is a centralized method for managing all submitted ideas and evaluating them before proceeding to the Decision stage. All ideas, regardless of whether they are in the idea or assessment phase, or the Business Review or Technical phase, will be displayed in the Review stage. Good practice is to assign a Process Owner to the idea so that transitions can be approved after approval by the assigned Process Owner. The idea approver role will have the option to reject the idea, mark as duplicate, view automation profile, view the idea's description, archive the idea, or delete the idea from the platform. The actions available for automation vary depending on the user's role, the automation phase, and the status. Some of the actions available for automations are Approve to finalize and move the automation to the next stage, Rework Required to trigger the flow to the project manager to decide whether the automation should go through the COE flow or a citizen developer user, Put on Hold to discuss about the automation at a later stage, Archive automation, and Delete, which removes the automation from platform. The Decision Pipeline is the place where assessed ideas, in various phases such as Qualification, Technical Review, or On Hold, among others, are transitioned to the Implementation phase. This enables Project Managers or COE leads to make informed and reliable decisions about which ideas should proceed to the implementation phase. It also provides business owners with a graphical overview of budgets and savings for the assessed ideas. The dashboards provide a quick overview of the estimated benefit, in terms of the number of hours, of automating a certain process. In the dashboard, the following metrics are displayed: automation name, hours saved, idea potential percentage, and ease of implementation percentage. These metrics focus on cost savings, quality, and productivity. After accessing the Implementation page, all automations waiting to be implemented can be viewed. The actions available during this stage are Reject, which allows the Project Manager to reject the idea; View Automation Profile, Quick View, Put on Hold, Archive, and Delete. By accessing the Live page, all automations that are deployed to production can be viewed. Actions available on this page are View Automation Profile Page, Quick View, Archive, and Delete.

d) Explore Module and Dashboards:

[6] The Explore Automation Program displays automations submitted from all submission paths, including employee-driven ideas, COE-driven ideas, automation submissions, process mining, and task mining. Different filters corresponding to the nature of automation and the phase of automation can be used to filter out the required automations from the platform page. In the profile page, the user will have access to About, Cost-Benefit Analysis, Documentation, Components, Collaborators, and Change Requests. The Automation Phase Profile Header provides information about the Phase, Status, Submitter, and instructions on how to follow the automations. The phase and Status can be changed, and the values can be selected from the drop-down. By clicking Follow on an Automation, a user can receive notifications when updates are made in the Automation Profile page. Collaborative ideas undergo a review process that includes various levels of evaluation. On the About page, all

evaluations are displayed to facilitate a more efficient editing process. In the Automation Profile page, Date Submitted allows user to see when the Automation Idea was created. Development Type has the following drop-down options: No Developer Type, which is typically selected after submission; COE; Citizen Developer self-user; and Citizen Developer Power User. Idea Type has the following dropdowns: Employee-driven idea, Coe-driven idea, Citizen developer automation, Task mining idea, Process mining idea, and Change request. Priority allows users to choose the appropriate level of importance. The numbers from 0 to 100 can be selected. The benefits section allows users to add text mentioning the benefits, both at the pre-implementation stage and the post-implementation stage. The Challenges section allows users to describe the difficulties during implementation. Lessons learned sections allow the user to capture the problems solved, which can be used as a reference for future implementations. Images and Media relating to the automation can be uploaded in the Media section.

A detailed process assessment must be completed by the Process Owner to evaluate the process on various parameters. The following fields are mandatory for detailed assessment [7].

- i. Automation Goal: Select the main reason for automating the process. There are several default values to choose from but the organization can also customize them. The available options are Cost Reduction, Quality Improvement, Employee Experience, Customer Experience, Compliance, and Revenue Increase.
- ii. Environmental Stability: User selects whether the process is about to change in next 6 months. Options include no change, minor change, several changes, etc. This section provides an option to capture process changes and application changes.
- iii. Employee Profile: The information related to the average number of working days per year, excluding company holidays and national holidays, the average working hours per day in alignment with the legal number of working hours in a day, and the average employee full cost per year for employees performing the process is captured in this section.
- iv. Process Voluntary: The Task frequency, meaning the number of times the process needs to be executed, is captured. It can be hourly, daily, monthly, or quarterly. Also, the information related to Volume Average, Number of employees performing the Task, Average Time per transaction, Total processing time, Average error rate, Total rework time, Average work to be reviewed, Average review or Audit time, Total Review or Audit time, Total time required to perform work, Number of Full time employees necessary to perform the process, and cost per year to perform process is captured
- v. Process ways of working: Process peaks, Average number of steps, and number of ways to complete the process is captured here.
- vi. Data Input: Data on the Percentage of Digital Input, Scanned Input, and the percentage of structured digital data input is captured.
- vii. Additional Information: If the system admin has defined additional information, it can be captured in this section. However, this information will not be used for assessment.
- viii. Applications used: The list of applications required to perform the process can be selected from the App Inventory. If an app is not available, it can be added to the App Inventory

- ix. **Post Automation Results:** Once an idea is moved to the Live phase, this section will be visible. This section displays the average time required to process one transaction, the frequency of error occurrences, and the duration of error resolution.

A Detailed Assessment Algorithm is implemented to support the Automation idea implementation decision. The criteria can be selected as Cost, Quality, or Productivity as the primary driver of automation. The primary factor chosen for each automation concept is incorporated into the Decision Pipeline Dashboard, enabling the comparison of automation concepts that share the same key factor. The assessment algorithm runs and computes the scores for Feasibility – Yes/No, Automation Potential in percentage (Higher the better), Ease of Implementation in percentage (Higher the better), and Assessment KPIs calculated for 1 1-year period. An example analysis is provided in the Figure 1- High level assessment

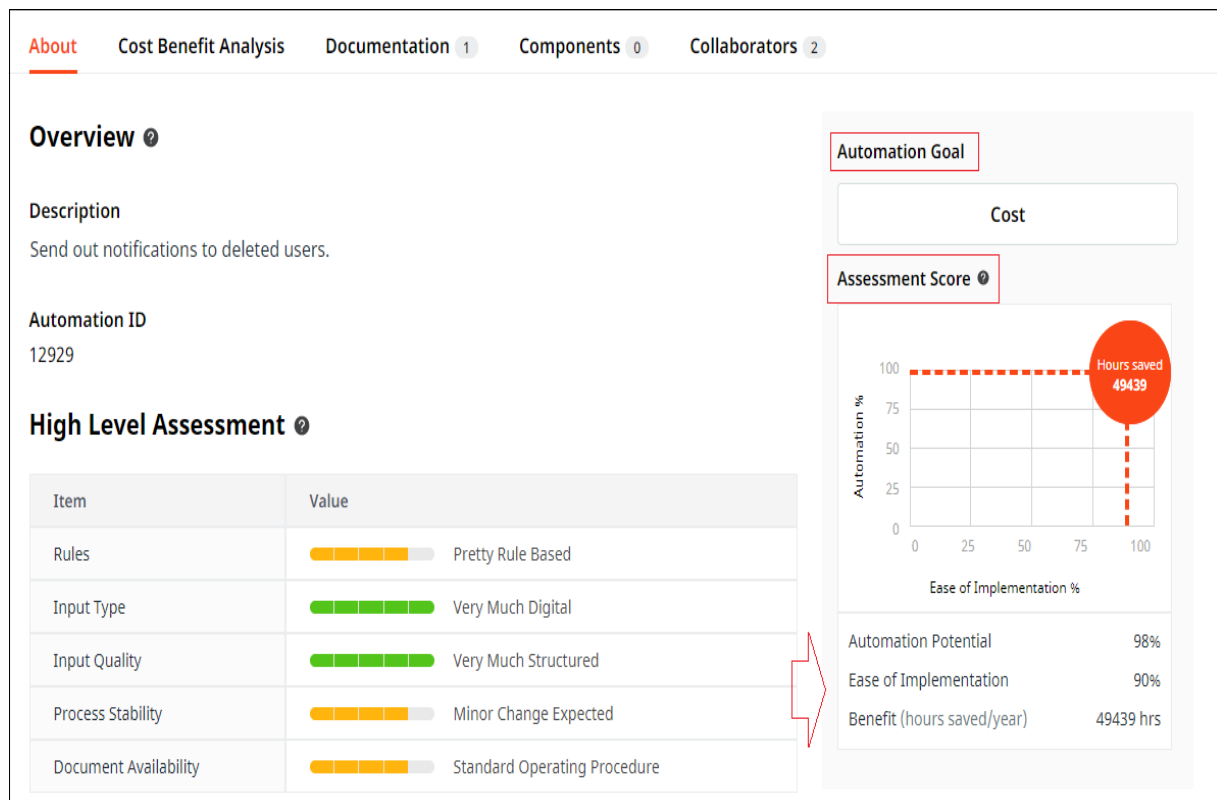


Figure 1- High level assessment

Output of Feasibility can determine if an Automation process/task can be achieved for the current period basing on the information on Process Stability and Application Stability. Automation Potential Score is the measure of the suitability of the process for automation[8]. It determines how much of the process can be automated and is based on information: the Degree to which data is unstructured, Process variability, and the degree of digitization. Ease of Implementation metric considers the following factors as input: Process Stability, Application Stability, Degree of Structured Data, Process Variability, Process Length, and Number of Applications Used. Implementation is Easy if the result is between 65% and 100%, Medium if the result is between 35% and 65%, and Difficult if the result is between 0% and 35%. There are several Assessment KPIs and each KPI is calculated based on a certain formula. Estimated Benefit per Company (Hours):The Automation Potential %

multiplied by the Total Time Needed to Perform the Work - (hours/year); Total Time needed to perform the work (hours/year); Estimated Benefit per Company (Currency): The Automation Potential % multiplied by the Cost/year ; Cost/year for the process As-Is is based on two factors: Average employee cost per annum and FTEs required= Total time Needed to perform work/Average working days per year/working hours per day ; Estimated Benefit per Company (FTEs): Automation potential % multiplied by the FTE Required; Estimated Benefit per employee (Hours) : Benefit per company(hours saved/year)/Number of Employees; Estimated Benefit per employee (FTEs): Benefit per company(FTEs)/Number of Employees; Estimated Benefit per employee (currency): Benefit per company(currency/year)/Number of Employees.

Submitting a change request is also possible in the dashboard [9]. This can be done for a live project that is currently in production or an idea that is still in implementation phase. These kinds of requests typically occur when there is a minor change in flow, a process improvement, or when a bug is reported, allowing for the incorporation of the change request without creating a separate automation. To create this, permission to submit a Change Request is necessary. By default, the Account Owner, System Admin, and Program Manager roles are assigned. A form must be completed to submit a Change Request, which includes details, applications, documentation, collaborators, and benefits. After capturing the necessary data for the change request, click "Submit for Review." "The manager will be notified of the task via email, and the task will be generated in the Automation Hub. The Change Request will follow the same phases as the Automation idea, but it will proceed directly to the Qualification phase, marked as 'Awaiting Review'.

In the Dashboards section, the following dashboards are available: Automation Program Performance, Average Automation Cost, Planning Report, and Cost Report. Customization can be achieved by modifying the available filters. The charts available on the Automation Program Performance page are the Pipeline Evolution chart and the Current Pipeline – 1-Year Benefit Estimate chart. The Pipeline Evolution chart mentions the number of automations over a customized period. The current pipeline chart illustrates the benefits of current automations in terms of estimated hours saved over a one-year period. The values are computed based on the inputs given during the detailed assessment step. The KPIs from the detailed assessment influencing the pie chart are Revised benefit per company (in hours saved per year), Revised benefit per company (in currency per year), and Live automations. Average automation cost can be visualized by cost type and ease of implementation. Automation ideas that lack information on costs, final ease of implementation, or the assessment phase will not be displayed in this section. The Planning Report provides an aggregate view to estimate whether there has been a near approximation, over-approximation, or under-approximation of the effort required for implementation. Information is structured into the following phases: Analysis, Solution Design, Development, and Testing. The Cost Report outlines the cost of automation in all phases except the idea phase. Additionally, you can download CSV reports for these dashboards.

3. Integrating Automation with Task Mining and Task Capture:

Different components in Automation Hub work together to build a pipeline that generates and tracks an idea from the idea phase to the implementation phase. Process Mining integration helps users to submit ideas directly to the Automation Hub. For this, the Automation Hub service and Process

Mining Service must be enabled on the same service. For example, when a user identifies an issue with a process in Process Mining, they can submit a request to automate it in the Automation Hub. Some issues include higher error rates and huge processing times [10]. In the process graph, select Submit to Automation Hub. Select the Activity from the drop down list, enter a name for automation idea, provide description of the idea, select the name of the category that is predefined in Automation Hub, select number of ways to complete the process, enter percentage of digital input, select percentage of structured digital input, optionally enter email of process owner to capture more details, and select submit. Task Capture can be opened in Automation by the process owner, the idea submitter, or anyone with edit rights to the automation idea. Click on 'Create New Process Document with Task Capture' and capture every step of the process, then export it as a document. For this, Task Capture must already be downloaded to the system. [11] RPA and process mining have very high untapped potential to be explored from the ideation phase to the bot development phase. To begin with, using process mining to analyze a workflow before implementing RPA can result in a more efficient and enhanced process, which makes the implementation of RPA easier. Secondly, the data from process mining at a minute level will help the RPA implementation to be more effective. Hence using RPA and AI, processes can be explored for initial assessment in a reliable way with proper data. Process mining can help find automation potential by analyzing repetitive structured data in large and complex processes.

4. Integrating Jira with Automation Hub:

Previously, Excel or Google Sheets were used to track the efforts, ROI, and Status. Using this method, pipeline, and prioritization stages are manually tracked and updated. However, using Automation Hub, most of these manual tasks are streamlined and captured in a centralized manner. Additionally, SharePoint or Confluence pages required manual updates, and users may sometimes overlook updates at each stage of the implementation process. Automation Hub offers a centralized platform for tracking automation opportunities, featuring embedded ROI calculation and automation scoring. Additionally, there is improved visibility for business users, COE leaders, and leadership. The Jira integration with Automation Hub automatically creates and links Jira issues, maintains synchronization, and manages automation implementation without requiring the use of multiple tools. The prerequisites are a Jira account with necessary permissions, an API token generated from Jira, and required permissions in Automation Hub. The Jira connection can be set up via the Admin console -> Platform Setup -> Jira Integration. Provide the Jira URL, project key, and API token, and map the fields in Automation Hub to the corresponding Jira issue fields. There is an option to enable or disable automation for creating issues based on idea phase transitions. When an automation idea reaches the implementation phase, Jira issues can be automatically created. Once synchronization is enabled, changes to status or other fields in Jira automatically update in Automation Hub. This integration facilitates improved collaboration between COE teams and development teams, provides real-time tracking of development progress, and reduces manual work.

5. Conclusion:

Overall, UiPath's Automation Hub offers a distinctive approach to integrating all stages of the Business Process Management (BPM) process. It captures the information related to the RPA project right from the ideation phase to the implementation phase. The dashboards generated by the data from the process

assessment are very helpful in performing an initial analysis and judiciously deciding, based on data, whether an automation opportunity can be taken forward for consideration. Each user can be assigned customized permissions as necessary within the platform. The metrics and the categories can also be customized based on business processes and departments. All the phases of the automation idea can be tracked effectively with ease using this platform. By integrating Automation Hub with Task Capture, Process Mining, and Task Mining, automation candidates can be effectively tracked and analyzed. Users performing a specific process can be tasked with capturing steps using Task Mining with Task Capture, and the data generated from each user can be published into Process Mining, enabling AI-powered insights about the process. Some of the metrics highlight high error rates, more time to complete the steps, process variations, bottlenecks, and deviations. The generated insights also help identify automation candidates most suited for RPA, as well as inefficiencies such as long wait times or repetitive loops, or frequent exceptions. These features help transition the process from discovery to dynamic, AI-powered improvement. Hence, using this integration enables faster and reliable automation candidate selection. Additionally, the integration of UiPath Automation Hub with Jira is a game-changer in eliminating manual updates and tracking of the process. As we advance, Process Mining and Automation Hub integration will be at the heart of process assessment, continuously discovering automation candidates, and ensuring alignment with enterprise goals, powering end-to-end Hyper Automation.

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