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UiPath training: RPA application

3 days (21 hours)

Presentation

Put an end to recurring manual tasks with UiPath. With this tool, you can automate your workflows. UiPath is one of the [most popular RPA tools](#), and for good reason: this program will enable you to avoid human error and make substantial productivity gains.

During our UiPath training course, you'll be introduced to a leading RPA technology. A service that will help you save resources, protect you from errors and rapidly scale your business.

Following an introduction to RPA, we'll train you in the use of UiPath, showing you how to automate your workflows using the tool's features such as OCR recognition and [email automation](#).

The use of Studio and StudioX, the creation process as well as flowcharts and sequences will be covered during this course.

Objectives

- Master the specifics of UiPath Automation Cloud (SaaS)
- Automate business processes with native cloud services (Serverless, AI Center, Web Studio)
- Exploit exclusive cloud functionalities: Autopilot™, Document Understanding, API Management
- Implement cloud governance via Automation Ops

Target audience

- Project managers wanting to automate their business tasks

- Financial managers
- Technical managers
- Product owners

Prerequisites

- Basic knowledge of RPA (ideal but not mandatory, thanks to AI cloud assistants)

UiPath training program

Introduction to UiPath Automation Cloud and structuring of environments

- Overview of UiPath Automation Cloud (SaaS platform, available services, automatic updates)
- Components and terminology: organization, drivers, licenses, services (Orchestrator, Insights, Automation Ops, etc.)
- Best practices for organizing your cloud instance (use of multiple tenants or folders to separate environments)
- Navigating the UiPath Automation Cloud portal interface
- Navigating the cloud portal and showing the different services
- Create an Orchestrator service (tenant) and explain its parameters (name, region, etc.)
- Explore an existing tenant to show its components (robots, machines, assets, queues)
- Practical exercise: create a test tenant in which they identify and note the various interface components.

Access, user and role management

- User invitation process via the Automation Cloud portal.
- Roles at organization level and in Orchestrator.
- Creating and modifying personalized roles and managing groups/folders.
- Invite a user and assign a specific role.
- Illustrate how to modify a role and restrict access (e.g. a user without "Edit" rights cannot modify a process).
- Practical exercise: configure the addition of a user with a predefined role on a test tenant.

Robot provisioning and license configuration

- Description of the different types of robots and their use cases
- How to create a machine in Orchestrator and configure a robot (classic and modern methods)
- License management (allocation, consumption tracking)
- Create a machine and robot in a demo tenant
- Connect the robot via UiPath Assistant and show it as "Connected" in Orchestrator
- Navigate the license management interface

- Practical exercise: create a robot following the provisioning steps, allocate the corresponding licenses and validate the connection.

Practical exercise - Setting up a complete environment

- Create tenant via Automation Cloud portal
- Allocate the necessary licenses
- Invite a user and assign the appropriate role
- Create a machine and a robot, then connect the robot via UiPath Assistant
- Check that the robot appears "Connected" and test a small process (e.g., a "Hello World" workflow)

Advanced supervision and monitoring via Orchestrator and Insights

- Orchestrator supervision features: job view, detailed logs, queues
- Overview of UiPath Insights and the types of reports available
- Configure automatic alerts and notifications
- Launch a live process and display its logs in Orchestrator
- Create a simple dashboard in Insights, filtering by period and process
- Configure an alert (e.g. robot disconnected)
- Practical exercise: analyze a fictitious incident by consulting logs, configure an alert and propose corrective actions

Centralized governance and application of Automation Ops policies

- Notion of RPA governance and risks in the absence of standards
- Introduction to Automation Ops: creating and deploying policies (e.g. prohibiting unapproved activities)
- Deployment methods and policy targeting (by tenant, user group)
- Accessing the Automation Ops interface and creating a policy for Studio (e.g. disabling an unauthorized activity)
- Deploy the policy on a test tenant and illustrate the effect in Studio (screenshot or video)
- Practical exercise: create a simple policy and deploy it in a test environment, then simulate its impact on a process.

Securing access and managing credentials

- Best security practices: strong authentication, access segmentation, principle of least privilege
- Asset credential management in Orchestrator: creation, management, restrictions
- Integration options with external safes and their advantages (centralization, auditing, password rotation)
- Create a Credential asset in a tenant and show its security parameters
- Illustrate the theoretical configuration of an external safe in Orchestrator (using a screenshot or a prepared guide).
- Practical exercise: as a group, audit the configuration of a fictitious tenant to identify security risks and propose corrective actions

Case study - Auditing and improving an existing platform

- Identify at least five weak points in a proposed scenario
- Propose concrete improvements for each point (e.g. creation of dashboards in Insights, deployment of policies via Automation Ops, integration of a safe for credentials).
- Prioritize actions to be implemented

Technical documentation - PDD, SDD and structuring deliverables

- RPA project lifecycle and presentation of deliverables: PDD, SDD, test plan, user documentation, etc.
- Detailed PDD content (process description, business rules, business exceptions)
- Detailed SDD content (technical architecture, flow diagrams, error management)
- Best practices for document structuring (versioning, centralized storage, use of templates)
- Present an example of a PDD and SDD model in a project (template projection)
- Show a typical document repository tree for an RPA project

Architecture and best practices - REFramework, modularity, error handling

- Presentation of REFramework and its states (Initialization, Get Transaction Data, Process Transaction, End Process)
- Examples of modularization: dividing workflows into reusable sub-processes
- Best development practices: variable management, comments, configuration outsourcing. Error handling strategies and differentiation between business and system exceptions
- Open a project created from REFramework in UiPath Studio and explain the structure of the project structure
- Show an example of modular workflow and exception handling with a try-catch block
- Explain how logs are generated and consulted in Orchestrator

Production release, version management and business continuity

- Deployment process: from development environment through rigorous testing to production
- Publication and management of packages in Orchestrator, version tracking
- Examples of continuity plans (use of redundant robots, triggers, resumption of activity in the event of an incident)
- Publish a development package and show promotion to a production environment environment in Orchestrator
- Illustrate the rollback process by selecting an earlier version of a process
- Show the Triggers screen and explain continuity management

Final exercise - Designing an administration strategy and validating the

technical deliverables

- Administration and governance strategy :
 - Define environment architecture (number of tenants, folder organization, license distribution)
 - Establish user and role management (rights, security policies, MFA)
 - Describe supervision (Insights dashboards, alerts) and governance (Automation Ops policies)
 - Describe security measures (credential management, safe integration)
 - Set up the production release cycle (testing, validation, deployment, version management)
- Audit pilot project:
 - Analyze the documentation (PDD/SDD) provided and identify any gaps or non-conformities.
 - Check Orchestrator configuration (assets, robots, logs).
 - Suggest improvements and prioritize actions to be implemented.
- Restitution :
 - Oral presentation of audit strategy and recommendations.
 - Discussion and collective feedback led by the trainer.

Companies concerned

This course is aimed at both individuals and companies, large or small, wishing to train their teams in a new advanced IT technology, or to acquire specific business knowledge or modern methods.

Positioning on entry to training

Positioning at the start of training complies with Qualiopi quality criteria. As soon as registration is finalized, the learner receives a self-assessment questionnaire which enables us to assess his or her estimated level of proficiency in different types of technology, as well as his or her expectations and personal objectives for the forthcoming course, within the limits imposed by the selected format. This questionnaire also enables us to anticipate any connection or security difficulties within the company (intra-company or virtual classroom) which could be problematic for the follow-up and smooth running of the training session.

Teaching methods

Practical training: 60% hands-on, 40% theory. Training material distributed in digital format to all participants.

Organization

The course alternates theoretical input from the trainer, supported by examples, with brainstorming sessions and group work.

Validation

At the end of the session, a multiple-choice questionnaire verifies the correct acquisition of skills.

Certification

A certificate will be awarded to each trainee who has completed the entire course.