




Introduction to Automation Essentials

Adv. Advisory | ACCTG 528 | Class 02
MPAcc Class of 2026

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What will we do today?

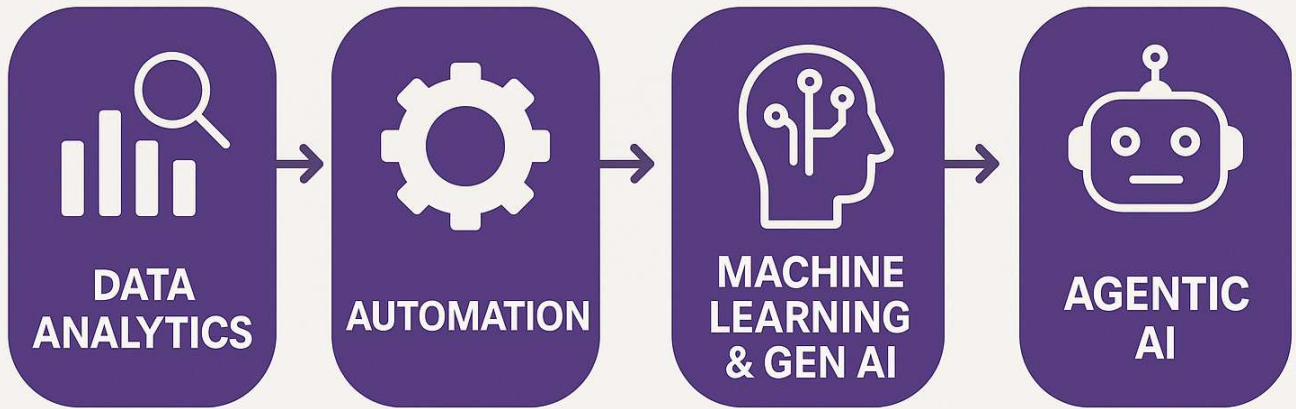
- Review of Class 01 (UiPath Cloud set-up)
- Essential tools and concepts
 - Connectors and triggers (email, file-sharing platforms, APIs)
 - Folders, files, variables (and objects)
 - Activities and Loops
 - LLMs and LLMs as Agents (API connectors)

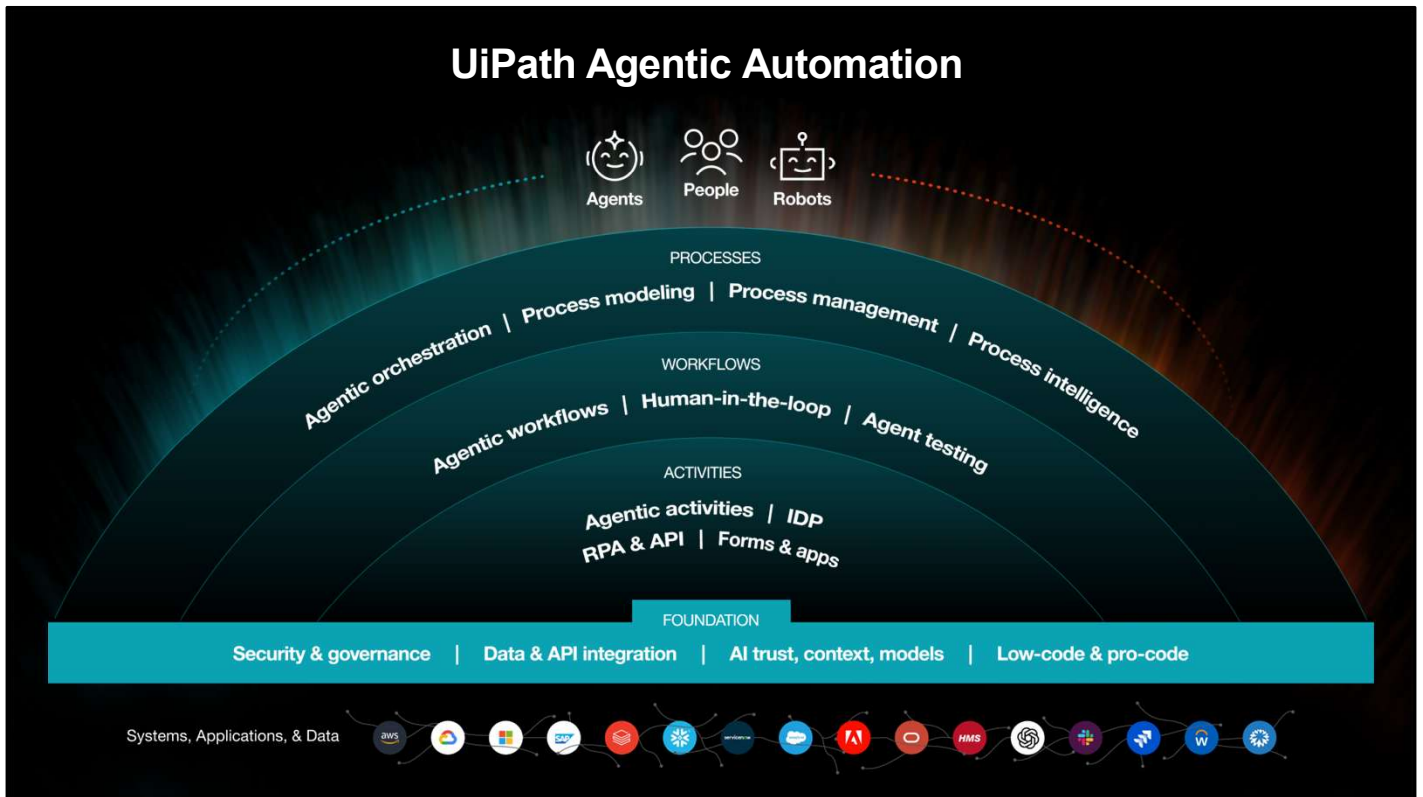




Automation Essentials | Review of Class 01

Course Diagram (high-level)





- Everything happens in one place: the UiPath Platform—where AI Agents aren't just assistants, they're true work partners, transforming complexity into a seamless, orchestrated operation.

- We break it down into three powerful layers: **Activities** (the building blocks—reading, processing, integrating), **Workflows** (connecting the dots with human-in-the-loop and testing), and **Processes** (the big picture—managing, optimizing, and enhancing enterprise operations).

- Agentic Orchestration / Maestro takes automation even further—coordinating UiPath Agents, third-party AI models, people, robots, and tools into a single, intelligent system.

- Your existing systems don't need to be reinvented—our platform integrates seamlessly with your data, applications, and workflows while maintaining enterprise-grade security, governance, and AI trust.

- We're not just compatible with your tech stack—we enhance it. From cloud providers like AWS, Google, and Azure to enterprise apps like Salesforce and SAP, we turn digital chaos into a symphony of efficiency.

Good morning, Asher Curtis

Turn intent into autonomous action

Meet UiPath ScreenPlay, a runtime agent that transforms natural-language instructions into resilient, self-driving UI automations.

Read the guide →



1. Where we start for RPA



Studio

Build processes, workflows, and agents in a no-code canvas.

Agents

Manage the full lifecycle of intelligent agents — from creation and deployment to ongoing monitoring, optimization, and incident...

Maestro

Orchestrate automated processes across systems.

Orchestrator

Centrally manage and monitor robots and automation resources.

Orchestrator services

MPAccAutomation

Last updated: 8 months ago

Start from popular templates

Virtual Machine provisioning in Azure

Generate a Virtual Machine (VM) in Azure with custom parameters and configurations.

Try it

Forward Outlook emails to another account an...

When a new Outlook email is received, forward it to another account and move it to a different folder.

Try it

Table Data Extraction for Sales Opportunities to...

Take data from rpa.samples.com/oppportunities, write it to a new Google Sheets spreadsheet, and send the spreadsheet to your Inb...

Try it

Extract data from a document

This automation extracts data from a document using UiPath's Document Understanding.

Try it

OpenAI

A connector for the OpenAI API that allows users to make requests and get completions using Large Language Models (LLM) and othe...

Try it

Send an email when a file is added to Google...

Get email notifications via Gmail when new files are uploaded.

Try it

Boost your productivity effortlessly

Automate tasks online, on any operating system. No installs needed.

Start in Studio Web

Looking for desktop products? Download center

What's New

Agents now support file handling. In public preview. Release notes

Build, manage, and scale system-to-system integrations with API Workflows. Read the user guide

Meet a new class of UiPath agents that engage in multi-turn, real-time conversations. Now in public preview

Resources

Subscribe to our product documentation. Subscribe to docs

Join the agentic automation community. UiPath Community Forum

Technical Issues? Contact support

A screenshot of the UiPath Cloud Home page

UiPath Cloud Home

2. Useful site-wide menu

1. Where we start for RPA

4. Useful helpers/starters

The screenshot shows the UiPath Automation Cloud home page. At the top, it says "UiPath Automation Cloud" and "Good morning, Asher Curtis". Below this is a "Get Agentic. Get Certified." banner. The main content area features four cards: "Studio" (Build processes, workflows, and agents in a no-code canvas), "Agents" (Manage the full lifecycle of intelligent agents), "Maestro" (Orchestrate automated processes across systems), and "Orchestrator" (Centrally manage and monitor robots and automation resources). Under "Orchestrator services", there is a card for "MPAccAutomation" and a "Start from popular templates" button. On the right side, there are sections for "Boost your productivity effortlessly", "What's New", and "Resources".

3. Might not be here – no need to worry.

UiPath Projects

1. Create new and select from the choices

2. Consider later for certain processes

Your projects (probably a template RPA and a Maestro Process, "Solution 1" and "Solution 2"?)

UiPath Studio

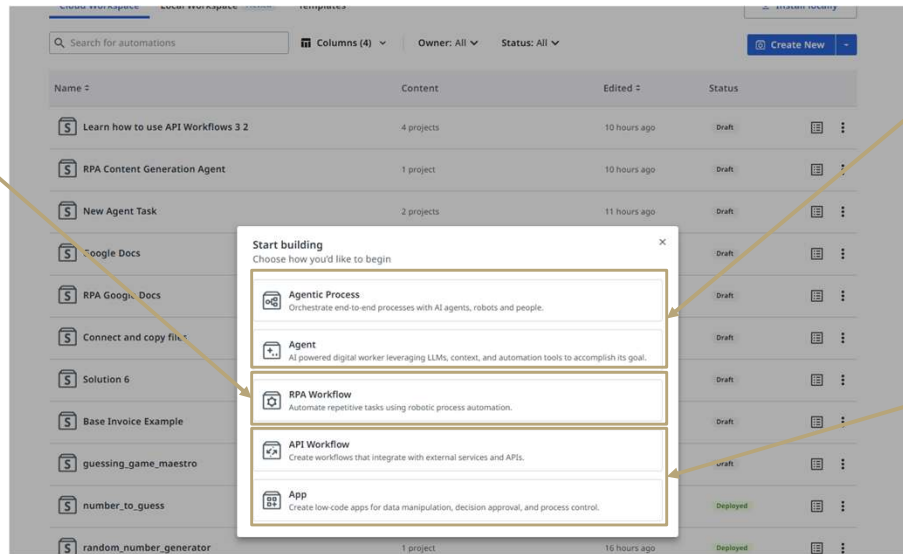
Cloud Workspace Local Workspace Preview Templates

Search for automations Columns (4) Owner: All Status: All

Name	Content	Edited	Status
Learn how to use API Workflows 3.2	4 projects	10 hours ago	Draft
RPA Content Generation Agent	1 project	10 hours ago	Draft
New Agent Task	2 projects	11 hours ago	Draft
Google Docs	1 project	11 hours ago	Draft

Create a new RPA Workflow (launches Studio)

1. Where we start for RPA workflows



2. Where we start new Agents and processes with agents

3. Additional Data Options and human-in-the-loop "Apps"

Studio Web Interface

The screenshot displays the UiPath Studio web interface. The top navigation bar includes the UiPath logo, the current project path "Solution 7 > RPA Workflow > Main", and a "Saved recently" indicator. Below the navigation bar, there are buttons for "Debug on cloud", "Debug step-by-step", and "Publish". The Explorer pane on the left shows a tree view with "Solution 7" expanded to "RPA Workflow", which contains "Main.xaml". The main workspace shows a "Manual Trigger" step under a "TRIGGER" section. Three annotations with arrows point to the Explorer pane: one to the "Solution 7" folder, one to the "Main.xaml" file, and one to the Explorer icon in the sidebar.

1. Name of solution (can contain multiple files)

2. Name of individual RPA file ".xaml"

3. Solutions menu (for variables and arguments moving across the solution)

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Studio Web Interface

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1. Menu to add new building block (UiPath "Activities")

2. Name of individual RPA file ".xaml"

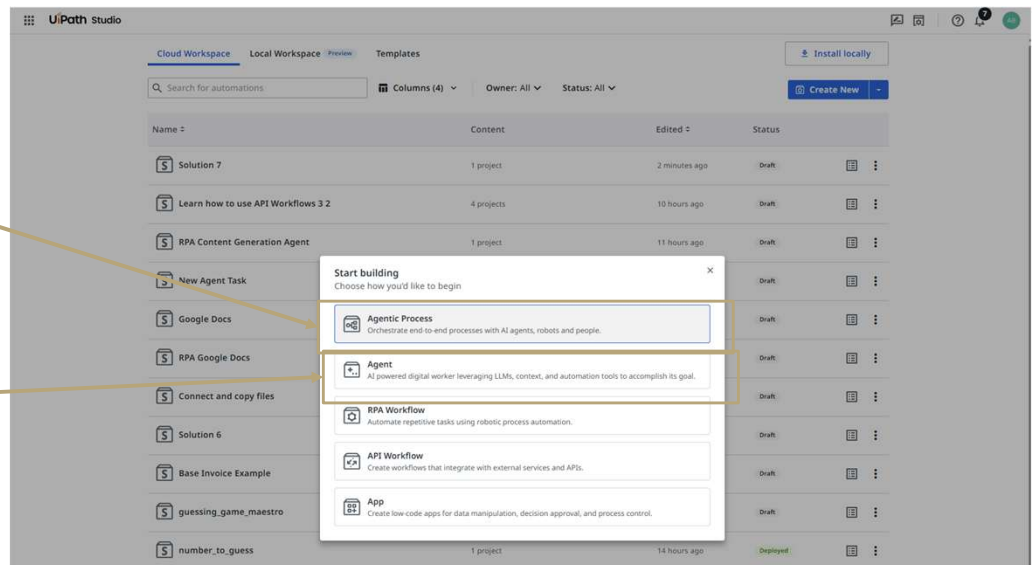
3. RPA Menu (configuration is the wrench, debug is the beaker)

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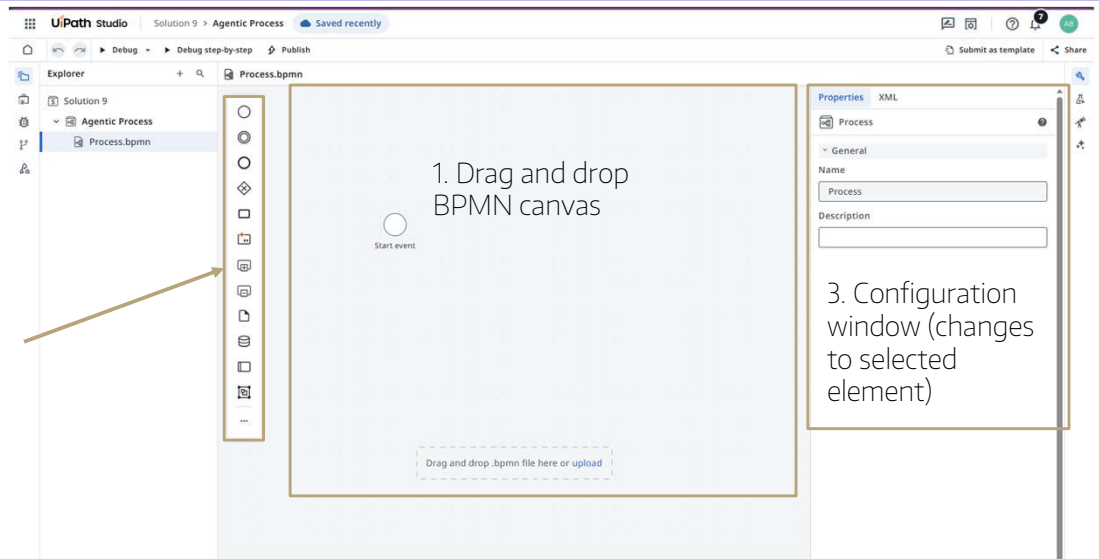
Create a new Agentic Process (launches Maestro)

1. Where we start for Maestro Processes and add an agent

2. In contrast here we start with just an agent



Maestro Interface



2. UiPath BPMN elements menu (unconfigured by default)

3. Configuration window (changes to selected element)



Automation Essentials | Essential Tools and Concepts

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Lab

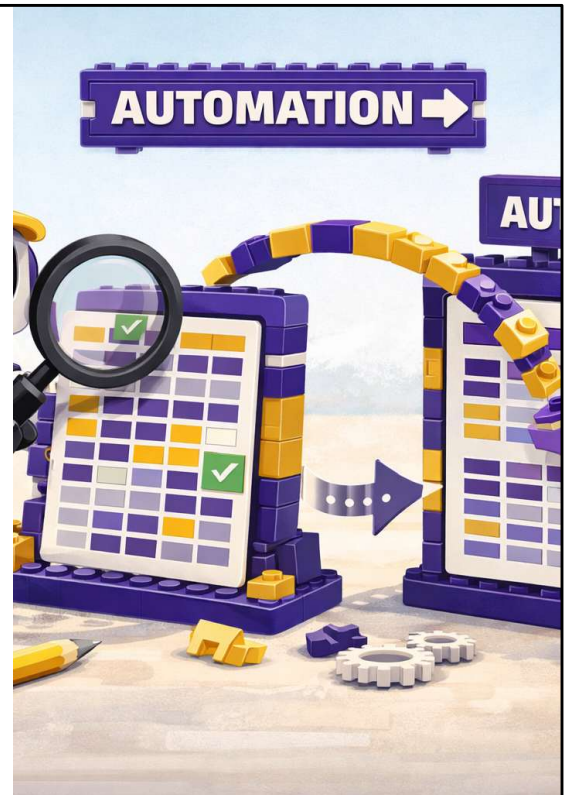
UiPath Cloud:

- RPA Workflows
- Maestro Processes
- Connecting them together



Where we will go next

- Spreadsheets
- Controls
- Costs and benefits of RPA
- Selection of Tasks for RPA versus Agent
- Manipulation of files



Thank you

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