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Robotic Process Automation

Taking an agnostic approach

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Introduction

As they continue their evolution toward higher degrees of automation, most organizations are looking for ways to improve efficiency and reduce costs while avoiding a rip-and-replace approach to their core business operations. Robotic process automation (RPA) holds promise as a technology that organizations can implement for specific use cases more quickly than reconfiguring core ERP systems and bolt-on applications. They can invest in RPA now for integration with line-of-business applications and existing infrastructure, with an eye toward eventual migration away from legacy systems. That, along with the maturing of RPA tools, helps explain their popularity—as well as the hype and high prices that always seem to accompany a hot new technology.

That said, RPA is not really so "new" as it is a way to use artificial intelligence to power metaphorical workers, or "bots." Benefitting from the evolution of artificial intelligence, RPA offers the potential to deliver value for any number of use cases across the enterprise. For example, any activity that involves logging onto multiple applications to reconcile data between sources, or redundant copy-paste, repetitive rounding of numbers, checking data for compliance with business rules—all are ideal candidates. Finance is a common use case today, with teams making major strides in mitigating manual effort and boosting efficiency—from accounting to procurement, from source-to-pay and order-to-cash to credit checking and reporting. HR may well be the next frontier, especially in complex benefits administration transactions.

Avoiding pitfalls in deploying a new technology

However, as with any disruptive technology, there are potential stumbling blocks to avoid, and considerations that should be part of any discussion involving an enterprise-wide RPA deployment.

Overhyped and overpriced products

Let's start with the previous point: The market is being flooded by vendors jumping on the RPA bandwagon, with products of varying quality. Implementation issues are legion, and customers are spending too much for too little ROI.

Short-term thinking about scalability

Whether RPA tools are managed from desktop computers or a centralized production environment, the IT department should understand the operating strategy from the outset. The tools must integrate with enterprise applications—with compatible user interfaces—and legacy systems. Achieving ROI requires enterprise scalability.

Governance problems

In some companies, IT is responsible for the technical aspects of deploying bots and implementing technical changes, while the lines of business oversee functional changes to business processes. That approach can work well. However, when the business takes ownership of building the bots, governance and compliance with company policies are too easily bypassed.

As a best practice, the IT department should be involved in any decisions about vendor choice, and should manage configuration, software distribution and robot scripts. This is a corollary of achieving ROI and scalability, and extends to operational efficiency and standardization.

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Security and access-control issues

While RPA tools can be relatively easy to implement on a small scale, their use can lead to security and access-control issues. For example, business users can build a bot and inadvertently embed user names and passwords in the robot definition, resulting in issues with exception handling or inadvertently blocking access by other users. Or an employee can willfully or accidentally sabotage the deployment so that the bot is not performing properly and disrupts operations.

Risk of failure

RPA tools don't always deliver on expectations. The most common issues are fundamental: the data is not clean or processes are not well defined. And when processes are not properly documented, failure occurs when data or processes change and are not adjusted in the RPA tool.

Taking the long view

While these considerations are important for an enterprise implementation, the reality is that many organizations, including OpenText customers, have already made substantial investments in RPA technology, with deployments in full swing. They might employ multiple RPA tools, either by design or by chance because different lines of business have introduced their own approach to RPA. In any case, OpenText has adopted a thoughtful approach that fully addresses these issues.

The OpenText strategy has long been to ensure maximum flexibility for our customers, as with our strategy of connecting case management to any content management system. It follows that our approach to integrating RPA with OpenText™ AppWorks™ parallels this concept. AppWorks is of course designed on the premise of flexibility, providing a single platform for digital process automation, dynamic case management and low-code application development.

We have thus chosen to integrate AppWorks with tools from multiple RPA vendors by offering a single RPA Connector featuring a plug-in concept. Whether you are already using a single RPA tool or have opted to use tools from different vendors, RPA can be used with AppWorks.

Adding another layer of digital process automation

RPA certainly does offer the potential to deliver value for any number of use cases across the enterprise. By integrating RPA with AppWorks, we're enabling another level of digital process automation. Let's use loan origination as an example.

When the applicant enters the system, the AppWorks process is kicked off automatically. The bot then executes the steps controlled by AppWorks, such as:

- Checking data/entries for compliance with business rules

- Extracting data from multiple sources—especially useful when customer master data relevant to the loan is stored in a mainframe system without easy access by other means

- Reconciling/validating/merging data between sources within defined business rules

- Creating, combining and amending loan-related documents within Adobe

- Uploading files to appropriate applications

To illustrate a simple use case, the bot:

- Picks up the loan application

- Determines if its originator is an existing or new customer

- Creates a new case file accordingly

- Maps it to the AppWorks application

- Indicates success or failure of the action

Integrating AppWorks with multiple RPA tools

In loan origination and in fact, most case management, some tasks can be automated, ideal for a bot, while others require human intervention or decision making. AppWorks complements the bot by enabling both processes.

Developers can incorporate any RPA tool into a seamless user experience with AppWorks, managing the data model, business rules and definitions for each bot. They can build custom plug-ins without changing how content is consumed in AppWorks. And developers conversant with AppWorks can do this easily with only the most basic knowledge of the RPA tools, and vice versa.

Using RPA with AppWorks automates integration with legacy systems that do not have a modern API (REST or SOAP WS) by using an unattended bot as part of an automation process. Further, AppWorks manages situations when a bot fails for some reason.
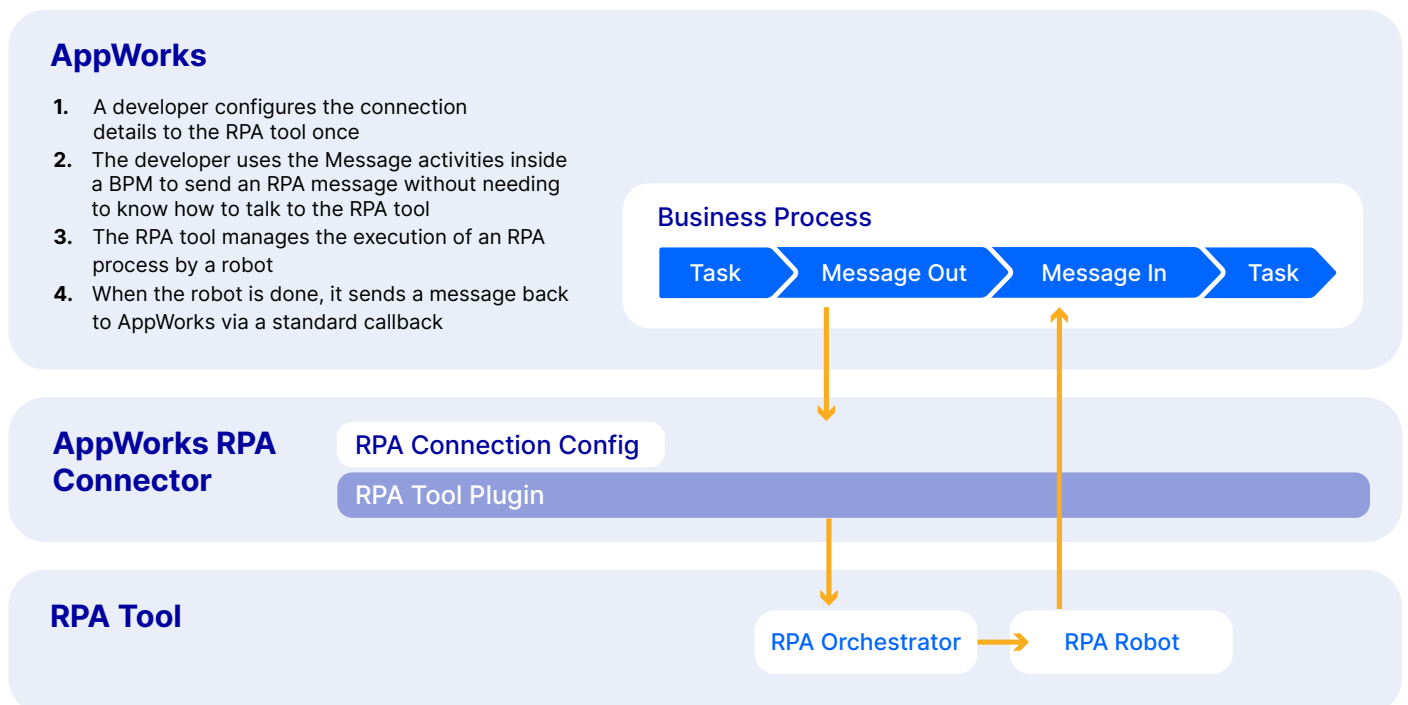
AppWorks

1. A developer configures the connection details to the RPA tool once
2. The developer uses the Message activities inside a BPM to send an RPA message without needing to know how to talk to the RPA tool
3. The RPA tool manages the execution of an RPA process by a robot
4. When the robot is done, it sends a message back to AppWorks via a standard callback

Business Process

Task > Message Out > Message In > Task

AppWorks RPA Connector

RPA Connection Config

RPA Tool Plugin

RPA Tool

RPA Orchestrator → RPA Robot

Figure 1. Configuring RPA in AppWorks

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Configuring RPA in AppWorks

- Configure the connection information once for each RPA tool in use.

- In each AppWorks business process that needs to use a robot check the box that enables RPA, then:

  - Select the RPA tool and confirm the settings: URLs, credentials, queues, etc.

  - Configure an outbound message to the RPA tool, passing details needed by the robot.

    - The RPA process can be triggered with any available robot or a specific robot.

    - RPA services will determine the actual machine and bot.

  - Configure an inbound message activity.

Realizing the value of AppWorks with RPA

It's clear that RPA holds great potential for achieving new efficiencies, boosting accuracy, reducing costs and eliminating the tedium of repetitive tasks. RPA holds even greater promise when deployed with AppWorks to orchestrate processes, rather than in disparate stand-alone or one-off configurations.

The real power is in the capacity of AppWorks to complement RPA by combining multiple automated tasks with human-centered activities in one seamlessly orchestrated process. And because AppWorks is designed to integrate with any RPA tool, it is ideal for new enterprise-wide RPA deployments as well as for those already in place across lines of business.

About OpenText

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