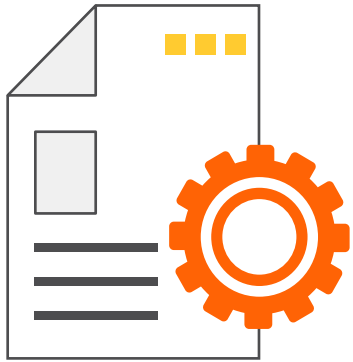


The Guide to
**Robotic Process
Automation**

Discover the top benefits, features and use cases of robotic process automation.



Introduction

Continual re-examination of the processes on which your organization runs is central to the idea of digital transformation. Digital transformation is enabling many companies and departments to examine their current processes—and determine how different technologies can be used to improve them.

If you've managed to achieve efficiency by eliminating paper and are paying closer attention to how you tap human capital, you may wonder what next step there is to take. Well, there's a development that has bearing on both the technical and human elements of digital transformation: automation.

Front and back office tasks need to be better streamlined without consuming crucial resources and disrupting business operations. That is where robotic process automation comes in.



What is Robotic Process Automation?

Robotic process automation (RPA) is the use of specialized computer programs, known as software “robots,” to automate and standardize repeatable business processes across multiple systems.

These robots perform actions directly across the user interfaces of applications, mimicking the tedious and repetitive activities employees would typically need to do such as logging in and out of systems, copying and pasting data, and filling out forms. The robots essentially work as a virtual assistant, helping free up time for employees to concentrate their talents on more interesting, productive initiatives.



What is Robotic Process Automation?

As a code-free, user-friendly way to link multiple applications together, RPA is fast becoming an important automation tool driving digital transformation and the future of work. As RPA advances even further, future iterations of the technology will only bring additional value. Advanced cognitive capabilities such as machine learning and artificial intelligence will allow bots to more intelligently interpret the interfaces they work across, better handle errors, and manipulate unstructured data.

Accenture predicts that **RPA can reduce costs** by 80 percent and reduce time by 80 to 90 percent. McKinsey & Co. echoes this, reporting that RPA can have a return on investment of **30 to 200 percent in the first year**. For its part, PwC estimates that **45 percent of work activities can be automated**, which would save \$2 trillion in global workforce costs.

No wonder then, that RPA technology is already drawing substantial attention from executives. Analyst firms are predicting some pretty heady figures for the field, ranging from **Forrester Research's prediction** of \$2.9 billion by 2021, from a base of \$250 million in 2016, to Deloitte's prediction of **\$5 billion by 2020**. **Demand for RPA** tools is growing at about 20 percent to 30 percent each quarter, according to Gartner.





Benefits of RPA

While many organizations have achieved significant gains improving compliance, reducing manual approvals and increasing productivity using existing process management tools, there are still opportunities for improvement.

Many organizations still struggle with disparate systems that do not talk to each other and require employees to make manual updates. This leads to so-called “swivel chair automation,” where employees switch between multiple applications to perform their daily tasks. Such work can be frustrating, repetitive and inefficient.



Benefits of RPA

As a user-friendly and cost-effective tool, RPA provides a number of business benefits which include:

- **Reduced costs.** Process cycle times are more efficient and can be completed at a faster speed compared with manual process approaches.
- **Increased productivity.** Operations can be performed around the clock as bots work tirelessly and autonomously. Employees need to intervene only to make a decision or resolve an error. With bots completing manual, tedious tasks as well, employees have more time to better focus on valuable work.
- **Improved process visibility.** Because the tasks are all performed by software, they can more easily be recorded for auditing or reporting, revealing bottlenecks in business operations and helping create financial forecasts and budgets.
- **Meet regulatory compliance standards.** Bots only follow the instructions they have been configured to follow and provide an audit trail history for each step. The controlled nature of bot work makes them suited to meeting even the strictest compliance standards.
- **Low technical barrier.** Advanced programming skills are not necessary to configure a software robot. Even non-technical employees will be able to use a graphical bot designer to configure software robots for solving their automation challenges.

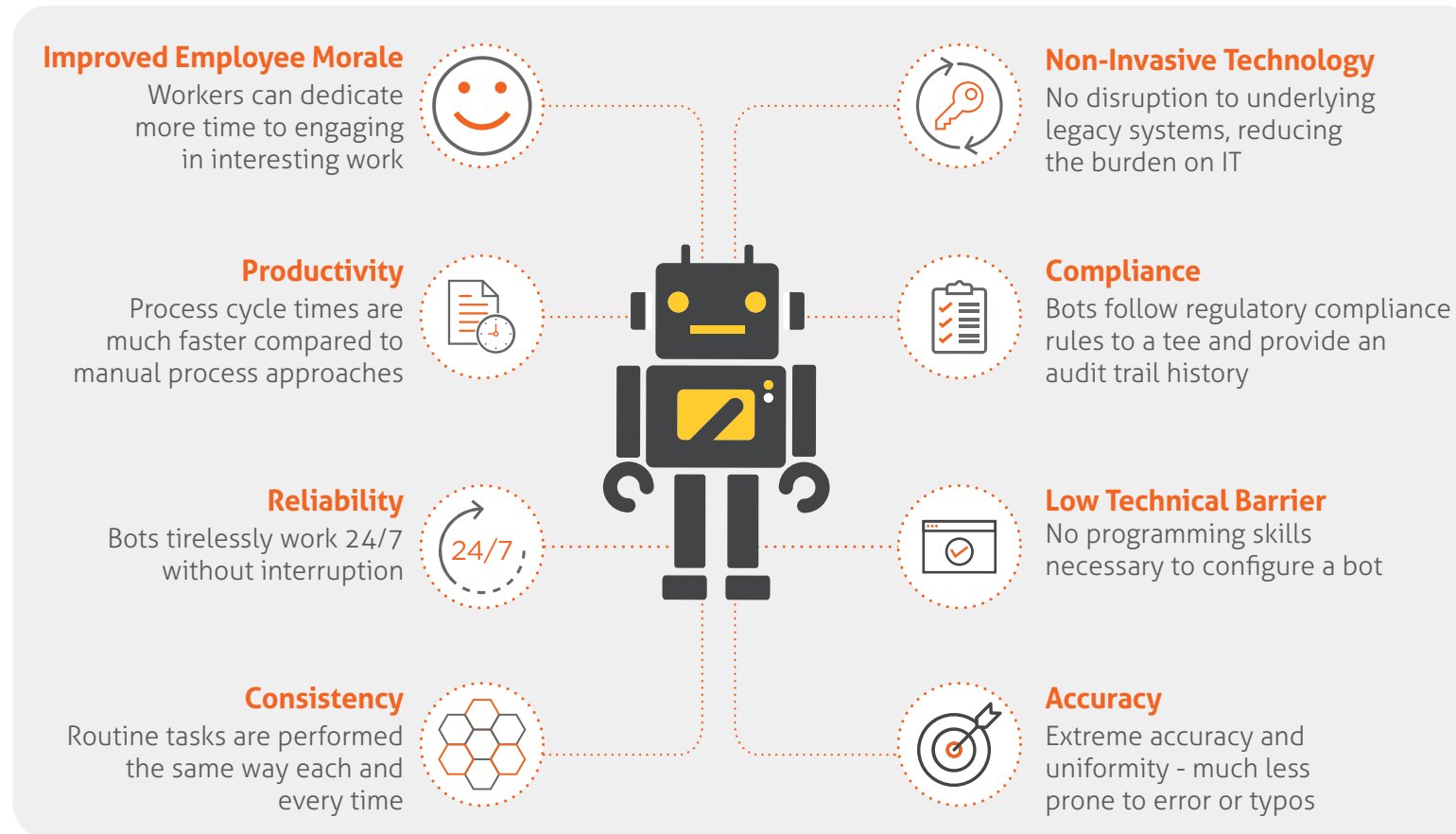


Benefits of RPA

- **Increased accuracy.** Bots are extremely accurate and consistent – they are much less prone to making mistakes than a human worker.
- **Flexibility.** Depending on workload, an organization can assign a small army of bots to a high-intensity job – and then shut them down afterwards, instead of having to lay staffers off or hire temporary workers.
- **Supporting non-invasive integrations between multiple line of business applications.** Unlike traditional automation initiatives that may require extensive developer resources to integrate across multiple applications, RPA involves no disruption to underlying systems. Robots work across the presentation layer of existing applications just as a person does. This is especially useful for legacy systems, where APIs may not be immediately available, or in situations where organizations do not have the resources to develop a deep level of integration with existing applications.
- **Improved employee morale and employee experience.** Employees will have more time to invest their talents in more engaging and interesting work since bots enable workers to offload manual tasks like filling out forms, data entry and looking up information from websites.

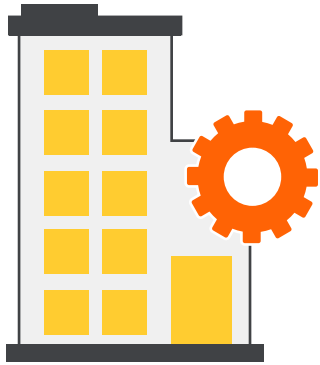


Benefits of RPA



With the many benefits robotic process automation provides, it should be considered as part of an organization’s overall business process automation strategy. By incorporating robots, organizations are able to achieve an increased level of automation, empowering staff to assume higher value tasks.





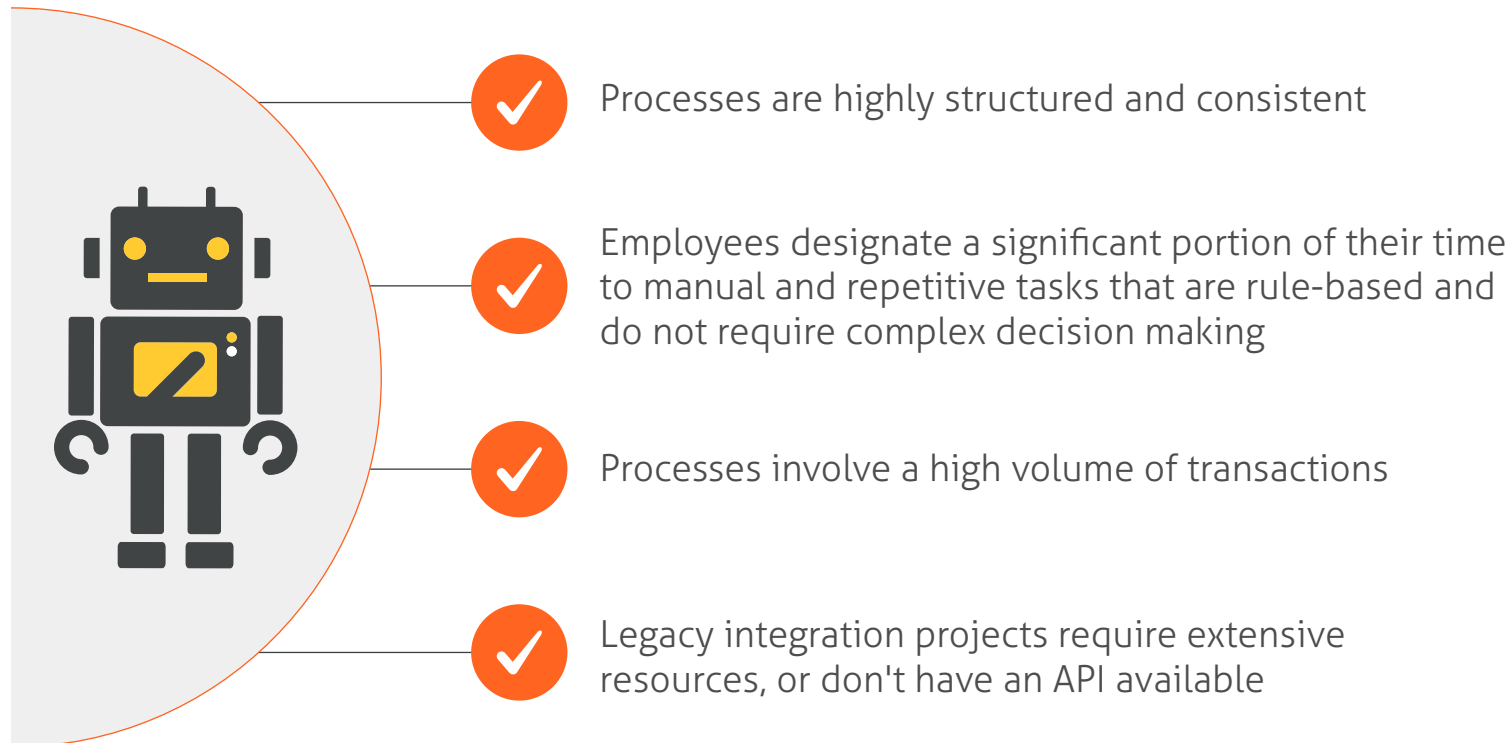
Is RPA Right for Your Organization's Processes?

It's important to remember that an RPA bot doesn't have judgment. If the process requires a human to make a decision, the human still needs to make the decision. But for run-of-the-mill processes, bots do just fine, leaving the **out-of-the-ordinary** cases for humans to deal with. The result is better customer service overall, as staffers have more time to deal with these unusual cases.



Is RPA Right for Your Organization's Processes?

Not all processes are meant for RPA, but there are several key characteristics of manual processes where RPA can be an appropriate implementation approach. These can include situations where:



Is RPA Right for Your Organization's Processes?

Sample activities that are good candidates for RPA include:

- Extracting and reformatting data into reports or dashboards
- Copying and pasting data between systems
- Generating emails
- Filling out forms
- Parsing documents and spreadsheets
- Making calculations
- Collecting social media statistics
- Reading and writing to databases
- Opening emails and attachments
- Logging into web/enterprise applications
- Moving files and folders
- Scraping data from the web
- Connecting to system APIs
- Following "if/then" decisions and rules
- Merging data from multiple places





RPA Use Cases

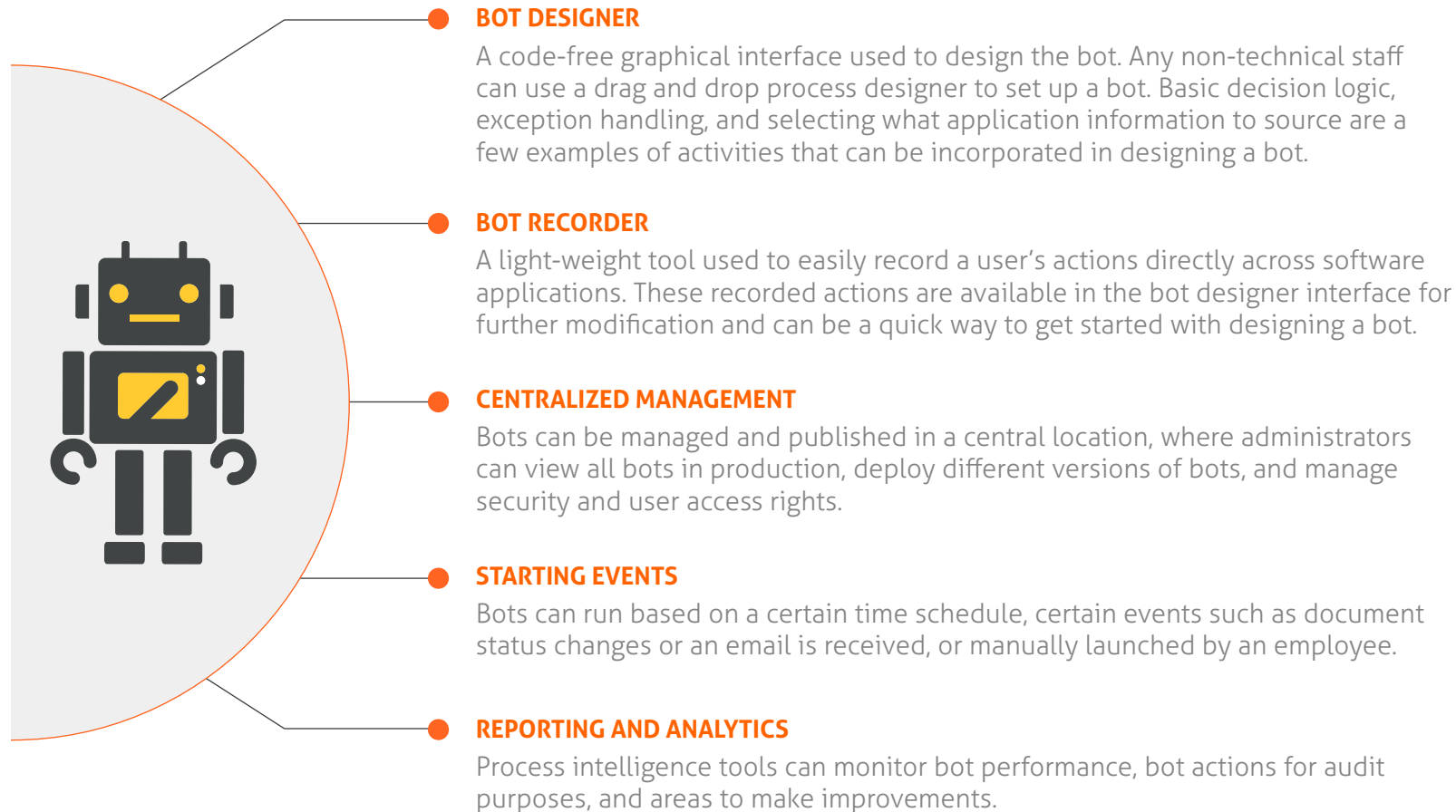
RPA has a broad range of use cases crossing many industries and departments, bringing immediate value to core business processes including:

Payroll	Deciphering timesheets to generate paychecks
Employee status changes	Parsing information from forms, spreadsheets, or emails and inserting it into a human resources database
New hire recruitment	Skimming incoming resumes and cover letters to identify those that contain certain keywords and sending them on to a recruiter for processing
Invoice processing	Extracting information from incoming invoices and checking them against data stored in an accounting system
Inventory management	Checking on the status of inventory and reordering any as needed
Insurance claim processing	Populating a claims processing system with policy management data
Report creation	Generating reports from databases or software applications and sending them to appropriate employees
New account opening	Populating a CRM system with information from numerous forms



Main RPA Features

An RPA solution usually consists of the following main features:





Where to Start and Considerations

If you've decided RPA is for you, **look for automation opportunities** – processes that are rule-based, not dependent on judgment, require transferring data between multiple line of business applications, supported by digital data, functioning and stable, and high-volume.

Once you're ready to deploy an RPA solution, there are a few key considerations when designing an automation plan.



Where to Start and Considerations

Step 1: Identify a Pilot Process

Before moving on to larger scale, more complex RPA solutions, working on a smaller scale pilot project can help ensure success for implementations in the future. The pilot project should be a clear bottleneck or pain point with a measurable return on investment. It is especially important that the process generally meets the characteristics of a process ideal for RPA, which include highly repetitive, manual and rule-based actions that can cross one or more applications.

Note that while automation brings its rewards, striving for one hundred percent automation can have its drawbacks in terms of complexity, resource availability, and time. Keep in mind even automating a certain portion of an overall manual process can bring about productivity and efficiency gains.



Where to Start and Considerations

Step 2: Establish a Governance Committee

This committee should include a member of IT, senior leadership on the business side, and owners of the business processes being transformed. It is also important to identify a strong project champion.

By establishing a governance committee, an organization has the following advantages:

- Closer communication between business and IT
- Representation of the employees who are actually involved in the process, as they are not only process experts but also have a vested interest in simplifying their day-to-day work
- Collaboration among various departments resulting in the identification of other business problems that can be addressed with automation

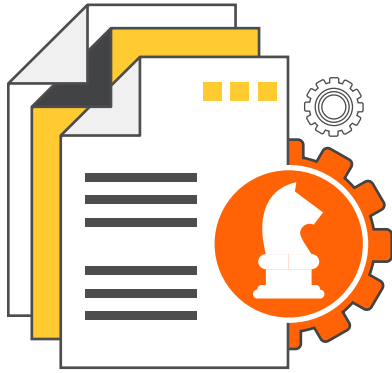


Where to Start and Considerations

Step 3: Plan for Change Management

Before implementing the solution, make sure to finalize your communications, training and deployment plan. A change management strategy is essential. Employees who feel like they are more involved in the implementation, may be more open to accepting new technologies that may shift their responsibilities. Some change management strategies include demonstrating how RPA will make the daily work of employees easier, and keeping employees updated regularly on the implementation status. Setting up training on the new system before it is even launched will make employees feel more comfortable and will give them opportunities to address their questions and concerns before they start using it.





Robotic Process Automation as Part of a Larger Strategy

Automation already has an impact on our day-to-day work, boosting our productivity for select tasks. These productivity gains are realized through increased output, accuracy, safety, speed and quality of work.

Automation will continue to impact professional life; it's incredible to imagine how RPA will evolve. As RPA advances even further, future generations of the technology will only bring additional value. Advanced cognitive capabilities such as machine learning and artificial intelligence will allow bots to more intelligently interpret the interfaces they work across, better handle errors, and manipulate unstructured data.



Robotic Process Automation as Part of a Larger Strategy

While RPA can bring about significant improvements as a powerful automation tool, it cannot bring about transformation on its own and be relied upon as a complete end-all be-all approach. Going beyond automating everyday repetitive tasks, RPA combined with existing content services and process automation technologies can help organizations make the most of their automation strategies. RPA fills in the gaps as a valuable, complementary technology to help organizations further reduce costs, increase productivity, and augment transformation efforts.

Laserfiche provides the full suite of process automation and content services functionality for a seamless and unified experience to achieve true end to end process automation. With RPA included as part of its robust ecosystem, Laserfiche further empowers employees to focus their talents on the work that matters.

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