Agenda

- What is Robotic Process Automation?
- View a Robot in Action – CSAC EIA Claims bot
- Where to Start - What processes are ideal to automate with RPA?
- Where to go to learn more?
The UiPath Enterprise RPA Platform

UiPath Studio
Digitize your process
Your business processes and workflows

UiPath Orchestrator
Manage and secure
Your digital workforce

UiPath Robots
Deploy and scale
Your attended and unattended robots
## Attended vs. Unattended Scenarios

<table>
<thead>
<tr>
<th>Attended</th>
<th>Unattended</th>
</tr>
</thead>
<tbody>
<tr>
<td>Works with the agent on their desktop</td>
<td>Runs on a stand-alone computer</td>
</tr>
<tr>
<td>Typically triggered by user activity</td>
<td>Scheduled by Orchestrator</td>
</tr>
<tr>
<td>Uses agent’s credentials</td>
<td>Has robot-provisioned credentials</td>
</tr>
</tbody>
</table>

### Common Assets:
- Common Codebase
- Centralized Reporting
- Encrypted Assets
- Seamless Handoff
CSAC EIA RPA Implementation Team

- **Cultural Adoption - SME**
  - Debbie Arnold
  - Claims Assistant

- **RPA Executive Sponsor**
  - Gina Dean
  - Chief Operations Officer

- **IT & Functional Engagement**
  - Jeff Louie
  - Senior IT Specialist
  - Kenny Popst
  - IT Manager

- **RPA Business Analyst**
  - Jen Hamelin
  - Director of WC Claims

- **RPA Business Analyst**
  - Mike Pott
  - Chief Claims Officer
Pilot Process: WC Merge Claim Process

Basis for Selecting This Process

Increase in Claims Submissions requiring additional capacity to do data-entry activities. Looking for an innovative solution to automate manual processes within Claims Department.

Goals of Pilot

- Reduce repetitive, mundane work
- Improve Employee Satisfaction
- Have Staff focus on high-value task
- Avoid ending profitable lease
- Test UiPath’s capabilities in SIMS, Word, Excel, Outlook and Document Management System
Anticipated Results in Leveraging RPA

- **ERROR REDUCTION**: 100%
- **COST REDUCTION**: 65+%
- **CYCLE TIME REDUCTION**: 75+%

True Enterprise RPA
Identify: Where to Start?
Guide to choosing the best candidate for automation

Start Here
Process Criteria Review

- Highly Manual
- Highly Repetitive
- Rules Based Process
- Readable Inputs*
- Standard Inputs
- Low Exceptions

Processing method can be changed?
- Yes
- No

High Volume?
- Yes
- No

System Changes Required?
- Yes
- No

RPA

Explore Process Improvement Initiatives
Implement Self Service
Explore for Tactical Solutions
Explore System Integration

* Readable Input Type = Excel, Word, email, XML, PPT, readable PDFs etc. Non-readable input type: scanned image with no OCR
### Processes every agency should automate

#### HR services
- Data entry
- Payroll
- New hires, transfers, exits
- Time & attendance management
- Benefits administration
- Recruitment (back office)
- Personnel administration

#### Supply chain
- Inventory management
- Demand & supply planning
- Invoice & Contract management
- Work order management
- Returns processing
- Freight management

#### IT services
- Software development
- Server & app monitoring
- Routine maintenance and monitoring
- Batch processing
- E-mail processing and distribution
- Password reset/unlock
- Back up & restoration

#### Finance & Accounting
- Procure to Pay
- Order to cash
- Record to report
- Vendor management
- Collections
- Incentive claims
- Sales order management

*Automation opportunities are practically everywhere in any organization.*

Besides the typical horizontal services, there are other organizational activities that can easily fall under the scope of any automation strategy.
## Finance and Accounting

### Accounting
- Automating complex journal entries
- Performing and documenting account reconciliations
- Calculating and applying allocations
- Maintaining fixed-asset accounts

### Accounts payable
- Entering non-EDI invoices
- Performing 2- and/or 3-way invoice matches
- Processing expense-approval requests
- Completing audits (e.g., Duplicate supplier payments)

### Accounts receivable
- Generate and validating invoices
- Applying cash to outstanding balances
- Analyzing and processing disputes
- Creating reports (e.g., Accounts receivable aging, credit holds)

### Financial planning and analysis
- Building standard management reports
- Consolidating and validating budget and forecast inputs
- Gathering and cleaning data for analysts

### Payroll
- Flagging time-sheet errors and omissions
- Auditing reported hours against schedule
- Calculating deductions
- Harmonizing data across multiple time-keeping systems

### Other
- Preparing external-reporting templates
- Conducting transaction audits of high-risk areas
- Preparing wire-transfer requests

Source: McKinsey & Company
Where to go to Learn More
Helpful links for you and your team

UiPath Academy
https://www.uipath.com/rpa-academy

UiPath Orchestrator Guide
https://orchestrator.uipath.com

UiPath Studio Guide
https://studio.uipath.com/

UiPath Robot Guide
https://robot.uipath.com/

UiPath Technical Support
https://www.uipath.com/contact-technical-and-activations

UiPath Marketplace
https://go.uipath.com/

UiPath Version Release Notes
https://www.uipath.com/release-notes

UiPath Community Forum
https://forum.uipath.com/

UiPath Demo Library
https://www.uipath.com/demo-library

UiPath GitHub - REFramework
Best practice for automation development
https://github.com/UiPath/ReFrameWork

UiPath On-demand Webinars
https://www.uipath.com/tutorials
Role-based training provides a rich & highly relevant learning experience for your Team – a critical component to a successful & timely deployment

For more details, check out: UiPath Academy Training overview.pdf