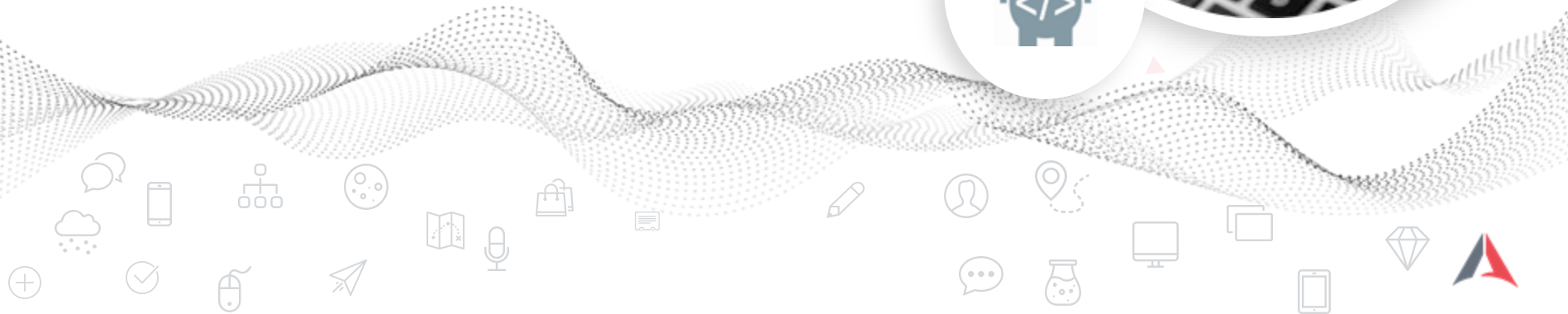


ROBOTIC **PROCESS** AUTOMATION (RPA)

(BOT) powers to business process automation

ACCURACY - MULTI-TASKING - **COLLABORATION** - **PRODUCTIVITY**

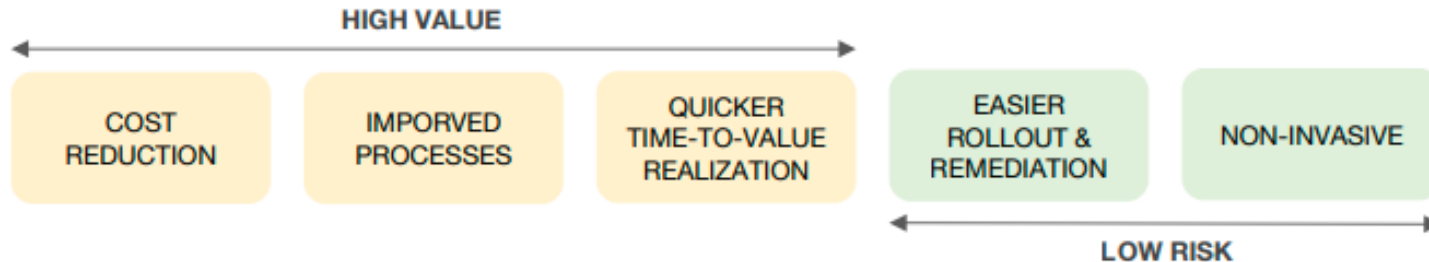


RPA - BOTs



RPA

Help businesses achieve higher accuracy while increasing efficiency by automating both business processes and operations



RPA Potential



Robotic Process Automation, goes beyond just automating tasks. It acts as a strategic tool and brings transformative effect on business processes

Continuous

Manual

BOTs

Integration

Repeated

Voluminous

Speedy

Attended
&
Unattended

Confidential

Error Free

RPA Practice Overview



25+ Clients Engaged with RPA Teams

- All projects involve RPA Engineers – Attended & unattended automation.
- RPA Integrated with CI/CD & Release Cycles
- End-to-End Automation – Migration, support, cognitive bots.

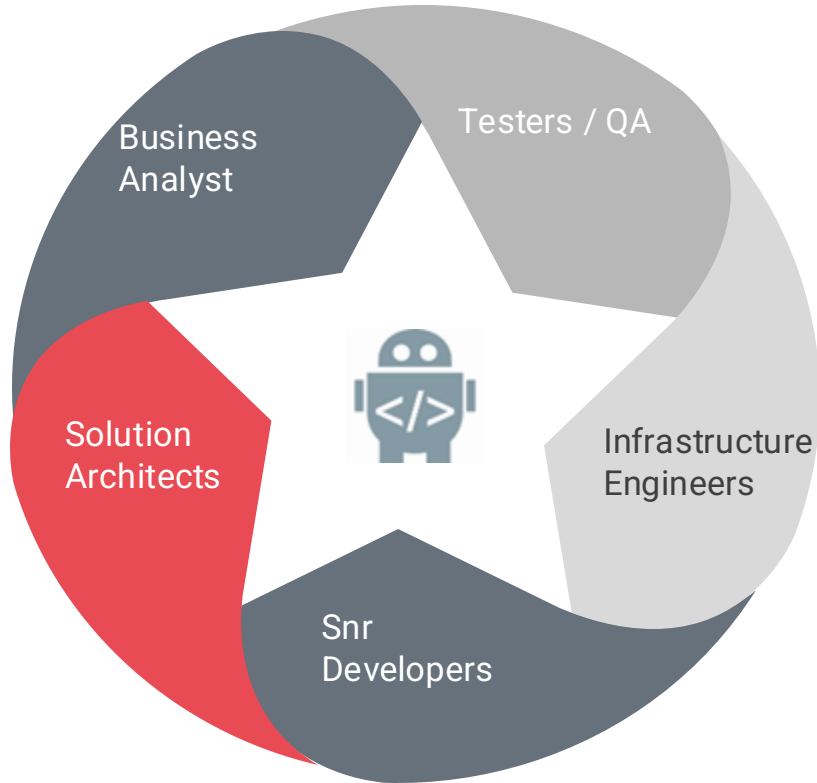
2500+ BOTS

- Automation of legacy projects
- New BOT development
- Migration of BOTS

60+ RPA Engineers across all Geos

- Geo leverage with 21+ Global locations

RPA Practice Group



COE group,
15 developers, 10 QAs, 5 BAs, 5
PMs, and a specialized IE/DevOps
team,
excels in delivering high-quality,
custom RPA solutions, driving
innovation, and enhancing RPA
capabilities across our projects.



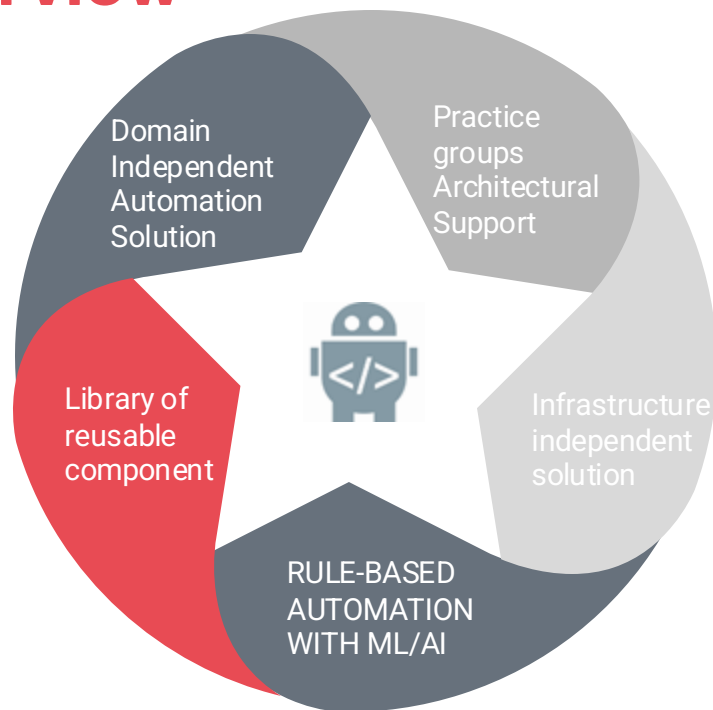
Accion Labs RPA Practice Overview

Accion RPA COE - group of developers, automation testers, solution architects and business analyst

Can be reached @ rpa_coe@accionlabs.com

RPA COE have access to internal library of reusable components that can be used as plug & play in any BOT workflows.

- Assistive BOT developments
- Cognitive & Trigger based BOT developments



Reusable RPA BOTS in Accion Library



- Accion's library boasts a diverse range of reusable RPA BOTS.
- These BOTS enhance automation efficiency across various processes.
- Developed with scalability and flexibility in mind.
- Easily customizable to fit specific business needs.
- Support for integration with popular platforms and tools.

Integration Highlights - RPA BOTS - Accion LIBRARY



- Database Integration
(MySQL/PostgreSQL/MongoDB)
- Web Interaction
- Data Formatting (XML & JSON
Generator)
- Data Studio/DASH
Reports/Insights
- GIF Creators - Greetings
- Candidate Resume Scan
(Doc/PDF)
- JIRA/Assembla/TFS

- Python Job Executor
- API Integration
- REST APIs
- Remote Server Management
- SSH Commands
- SAP
- Accounting Software
- QuickBooks
- Salesforce
- SharePoint
- Azure Text Analytics
- Multi-Factor Authentication
(MFA)(OAUTH/OTP)
- Secure Login

- Email Automation
- SMTP/IMAP Integration
- AWS S3/Google Drive
- SSH Commands
- Web Scraping
- Beautiful Soup/Scrapy
- File Management
- Machine Learning Integration
- Chatbot Integration
- Data Encryption Libraries
- Monitoring and Logging

Core Pillars of RPA COE

Governance & Compliance

Regulatory Compliance: Ensure adherence to industry standards.
Risk Management: Mitigate risks through robust controls.

Development Excellence

Re-Framework & Best Practices: Standardized coding and error handling.
Reusable Components: Build reusable bots for efficiency.

Strategy & Value Realization

Automation ROI Measurement: Track performance and ROI.
Process Discovery & Prioritization: Identify and prioritize high-impact processes.

People & Enablement

Training & Upskill: Empower teams with RPA expertise.
Operational Support: Ensure ongoing monitoring and maintenance.

Technology & Scalability

Scalability: Establish a scalable RPA infrastructure.
Integration Framework: Seamless integration with enterprise systems.

Innovation & Expansion

Beyond RPA: Explore cognitive automation, AI, and ML for advanced capabilities.

Integration Expertise

COE Proficiency

Comprehensive
Implementation

Phase	Key Activities	Timeline
1. Assess & Design	Identify processes, define roadmap, build COE framework	Month 1-2
2. Build COE Team	Onboard key roles: RPA architects, developers, analysts	Month 3-4
3. Develop Standards	Establish governance, templates, and best practices	Month 3-4
4. Pilot Deployment	Automate priority processes to validate approach	Month 5-6
5. Scale Operations	Deploy across departments with continuous improvement	Ongoing



Our Execution Model

Discovery Workshop

A one week discovery workshop to understand in detail the current processes of the identified uses cases. This workshop will help get a much better understanding of the users, their goals, stakeholders goals, technical challenges and technologies required for completing the project. Based on the outcome of the discovery phase, Accion will choose the most appropriate RPA tool to implement the use cases and also finalize the workflow for automating each use case.

Phase 0 Implementation

Post the one week discovery workshop, Accion builds the user flows using the selected RPA tool. Accion team shall hold daily Scrum call to provide updates. Accion team shall lead a weekly Demo of the work with product owners for their feedback / adjustments

Project Implementation

Accion automates the identified business process for efficient utilization of resources and increase the productivity of the IT procurement team by using the RPA tool selected post the discovery phase.

Re-framework - Robotic Enterprise Framework or Re-Framework is a template that is used to create automation workflows in a modular approach for large scale deployments. One of the best framework methodology for automation workflows. Parallel BOT execution by queue system, greatly reduces time consumption to complete transactions.



Accion Labs - RPA Tools - Overview & Expertise



Flowchart based configuration

Provides screen recorder too

Online marketplace for community built workflows

Integrated Debugger

Revision Control & Supports clusters

Task-list based configuration

Requires moderate technical skills

Supports clustering of bots

Provides analytics

Flowchart based configuration

PCI-DSS, HIPAA and SOX compliant

Provides centralized admin console

Provides analytics

Flow chart based configuration

Provides screen recorder too

Integrated debugger

Flowchart based configuration

Integrated machine learning and analytics

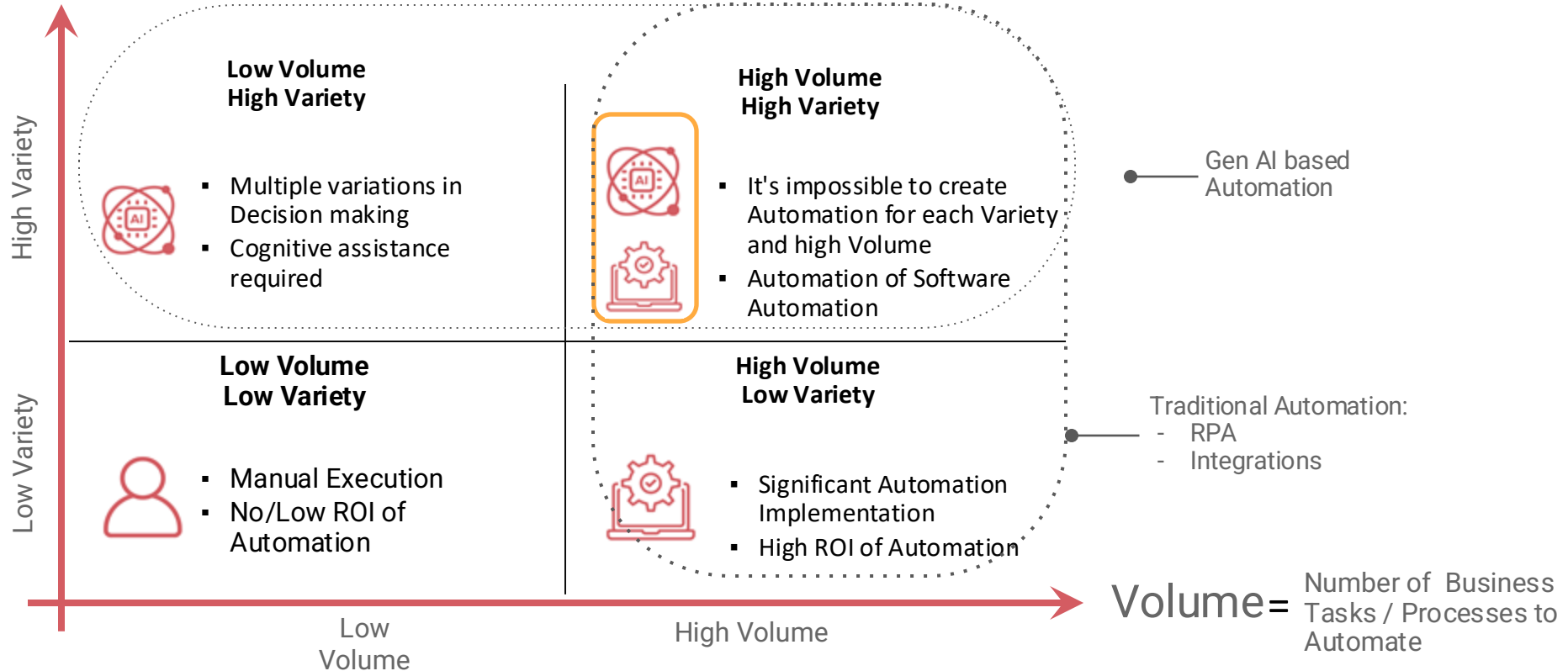
250+ connectors for accessing data

Secure cloud-hosted environment



Choosing The Right Automation Solution

Variety= Number of Variations in Automation Logic



Select RPA Case Studies

Leading Media and Entertainment company.

Client uses BARCS Media Workstation Application to get the TRP and analytics data on a weekly basis. This information is sliced into chunks on a per day basis and fed into SPOT DATA tool. The sliced chunks are executed on several servers with the SPOT DATA application..

largest Telecom services provider in Asia

RPA implementation automated the payment process. Incoming invoices are validated with the call statistics and compared with the billing systems data. Invoke reconciliation work flow if there is a mismatch with the invoice and the call statistics.

Financial institution providing Securities brokerage services.

RPA implementation automated the liability management process. The quarterly balance sheet from various fund houses were analyzed and automatically uploaded into internal tools.

Financial institution providing Securities brokerage services.

RPA implementation automated the process of retrieving capital funds, values & returns of various investment firms. Web scraping of investment management firms capital information is retrieved from their website and stored datasets for further processing.

Independent European bank offering private and merchant banking services.

RPA implementation automated the withdrawal process. Clients withdrawal request received is verified for its validity and processed by creating new request record in their subsidiary banks investment account.

Industry Leader in Drug Life-Cycle Insights

RPA implementation in arriving at Data sync between Quickbooks & Salesforce, in maintaining live customer, business data sync of (Invoices, Bills, Customer leads, Vendor lists). CRUD operations at one system is updated at other & viceversa.

North American Telecom service provider

New service order request received from CSE in the billing system is validated for its correctness. Respective vendor system is updated based on the request type received. CSE & Billing system is then updated with the status of the service order. Invalid request are then sent as feedback to CSE.

Pharmaceutical and formulation manufacturer

RPA implementation automated the payment process by interacting with the MRP system and the SAP based PO system. Eliminated manual errors in PO generation Faster PO generation as soon as the criteria is met in the MRP system.

Select - IT operations

Compliance and Security Monitoring:

Use Case: Continuously monitor infrastructure and applications for security vulnerabilities, compliance violations, and anomalies.

Benefits: Improves security posture, helps meet regulatory requirements, and mitigates risks.

Workflow Automation:

Use Case: Automate end-to-end workflows, such as incident response, service requests, and approval processes.

Benefits: Reduces manual intervention, accelerates task completion, and enhances collaboration.

Patch and Update Management:

Use Case: Automate the process of applying patches, updates, and security fixes to servers, applications, and operating systems.

Benefits: Enhances security, reduces downtime, and ensures systems are up to date.

Log and Event Management:

Use Case: Automatically collect, parse, and analyze logs and events from various sources to identify issues, anomalies, and trends.

Benefits: Facilitates troubleshooting, enhances visibility, and improves system reliability.

Engagement Model

RPA Sponsor *

Partners with Responsible for automation and the necessary resources

- Stakeholder

Partners with



Coordinates

RPA Infrastructure Engineer

* Handles server installations and troubleshooting

*Available as Accion Labs Resource

as RPA Project Manager

Collaborates with

RPA Solution Architect

RPA Change Manager

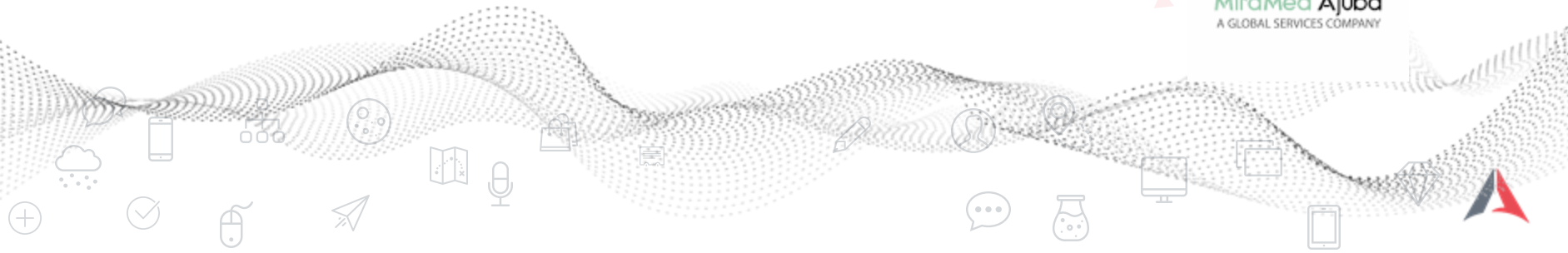
RPA Developer

RPA Business Analyst

RPA Service / Support



RPA Projects



THE CUSTOMER:

Fragomen - It is one of the largest immigration services organization.

BUSINESS CHALLENGE:

The objective was to automate visa filing process for applicants. The As-Is involved users taking data from an in-house application and manually entering it on the Government Immigration Application website. There could be issues such as human errors due to fatigue of repetitive tasks

ACCION RPA SOLUTION IMPACT: -

- The unattended bot will now process the data from the in-house application, translate it to the required target application format and automate the visa application filing process.
- Automated robot triggering. When the client submits case information in the in-house application, a periodic report with the case ID will be generated. The robot will fetch this and the queue will be updated with the input details in the UiPath Orchestrator.
- Ability to also retry failed cases once user edits input data and resubmits

Robot trigger through PHP Web Application

Fragomen - It is one of the large immigration services organization.

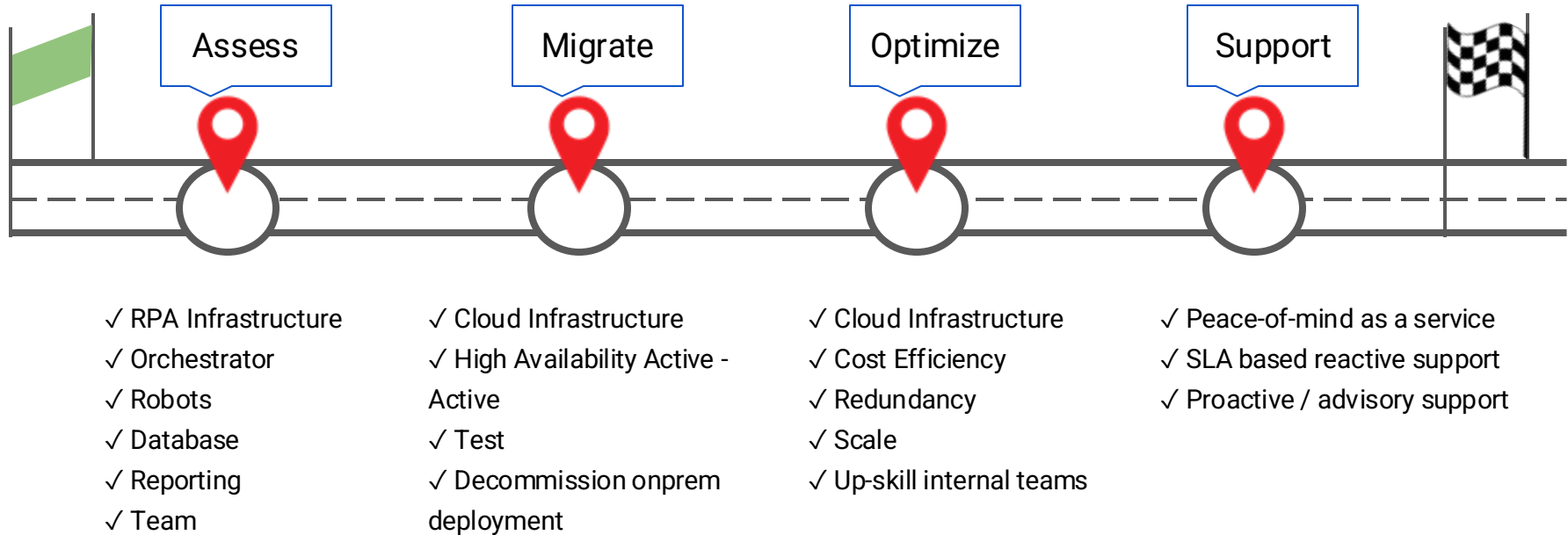
BUSINESS CHALLENGE:

1. **Diverse Input File Formats:** Multiple input files in varying formats were received from different staff members. This required the bot administrator to manually verify and align each file to a standardized template before initiating the robot.
2. **Unattended Ad-hoc Process:** The process was designed to run unattended, but it was triggered on an ad-hoc basis without any predefined schedules.

ACCION RPA SOLUTION IMPACT: -

- **Defined Input Fields in PHP Application:** The PHP-based web application includes well-defined input fields with a fixed format, ensuring consistency in data submission.
- **Automated Robot Triggering:** When a client submits case information via the PHP application, the data is automatically added to the queue in UiPath Orchestrator. This triggers a "start job" process, initiating the bot workflow without any manual intervention.
- **On-Demand Bot Execution:** One of the key milestones achieved is the on-demand bot triggering capability. This eliminates the need for separate requests or continuous monitoring, significantly streamlining the process.

Cloud Migration Strategy



Cloud Migration



BUSINESS CHALLENGE:

The objective was to migrate the RPA environment from on-premises to the cloud, in a seamless manner, so that the business continuity does not get impacted.

ACCION RPA SOLUTION IMPACT: -

- Initial assessment of the on-premises environment was conducted to estimate effort required and to formulate a migration plan that aims for high business continuity
- Evaluation of the cloud tenant features was done, to compare and understand essential items such as compatibility, encryption, accessibility, etc.
- Executed the migration plan in stages - following a staggered approach, where the Development/QA tenants and processes were migrated first. Followed by also migrating the production machines and processes to the production tenant in stages, so that processes could continue to run on the on-premise environment, until all machines have been migrated, and then resume on the cloud tenant, without impact to the business continuity.



BUSINESS CHALLENGE:

Inefficiencies in Collection Workflows: Manual processes slow down the collection cycle.

Lack of Predictive Insights: No real-time data to optimize contact timing or assess customer propensity to pay.

Need for Automation: High dependency on manual tasks reduces overall efficiency and ROI.

Solution Impact

- RPA Bots for Workflow Automation: Automating repetitive tasks like payment reminders and follow-ups reduces agent workload.
- AI/ML Custom Models: Implementing models such as Propensity to Pay (Score) and Best Time to Call provides data-driven insights for targeted actions.
- Triggering Bots Based on AI Recommendations: AI insights trigger appropriate RPA actions for timely customer engagement, improving cycle efficiency.

Benefits

Increased Collection Efficiency: Automation shortens collection cycles and enhances accuracy.

Enhanced ROI: Optimized processes lead to faster payments, reducing operational costs and boosting revenue.

Better Agent Productivity: By offloading repetitive tasks, agents can focus on high-priority accounts, improving overall performance.

Receivable Adjustments (Patient CashApp)

Objective:

Cash App is facing challenges with receivable adjustments in remittances, leading to discrepancies with third-party insurers. The current manual process for posting payments from Avadyne is inefficient, primarily handling full payments and excluding partial payments and POS balances. This results in billing delays and inaccuracies, affecting financial reconciliation.

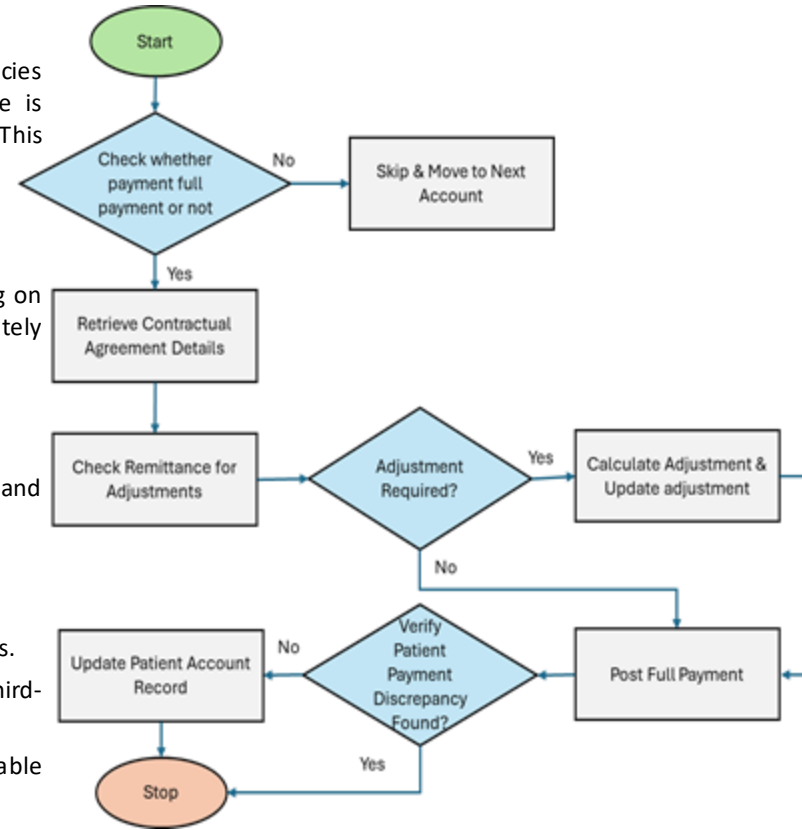
Solution Overview

The proposed bot automates the posting of patient payments received from Avadyne, focusing on full payments only. It ensures that adjustments at the line level of remittances are accurately reflected in the Acuity system, aligning with contractual agreements with insurers.

- Automation: Posts only full payments, improving efficiency.
- Accuracy: Reduces discrepancies in billing updates and reconciliations.
- Simplified Process: Checks payment data, navigates to the appropriate patient claim, and updates records seamlessly.

Benefits of Implementation

- Increased Efficiency: Reduces manual effort, allowing staff to focus on other critical tasks.
- Improved Accuracy: Minimizes billing errors and discrepancies, enhancing trust with third-party insurers.
- Faster Reconciliation: Streamlines financial processes, leading to quicker and more reliable financial reporting.



Consumer Banking Sector (FIS Pre - Deposit Bot Process)

Objective:

We will be receiving files in four different slots which needs to be picked and upload it to horizon portal and monitor for every 10 mins to clear the OFAC suspects and if any exceptions

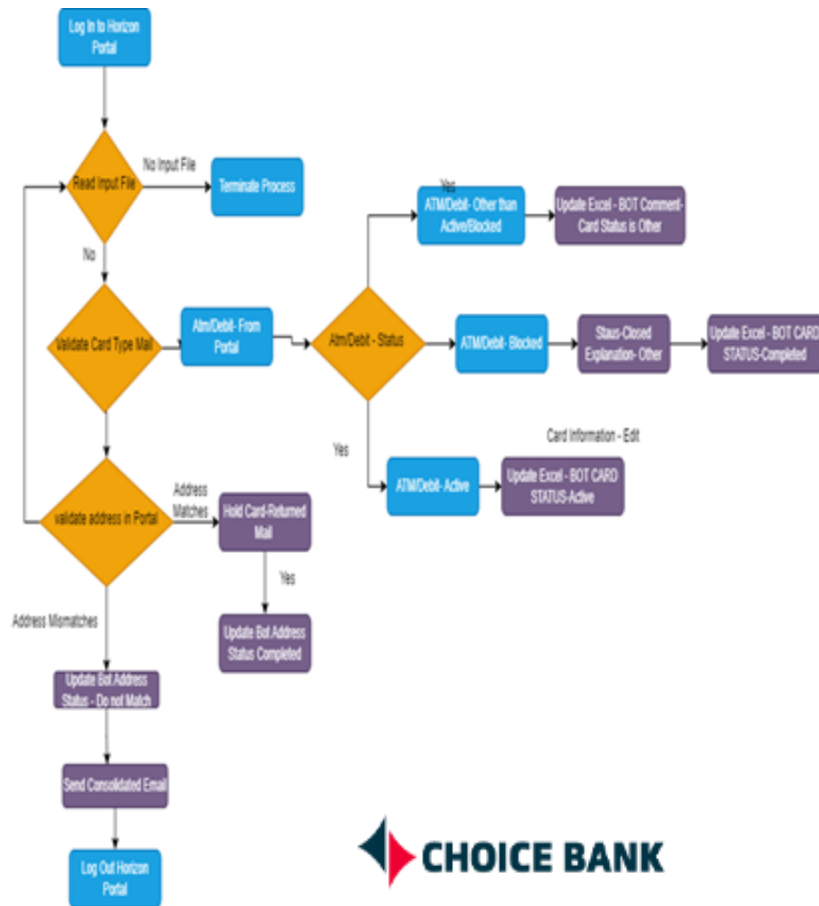
Solution Overview:

RPA bot Reads an Input File and checks if the mail type column mentioned as 'Card', and then validate to see if the status of the customer is "Active", "Blocked", or "Other".

If status mentioned as "Active" then to update the tracker status as "Active". If mentioned as "Blocked" to update the customer status as "Closed Type" and for others to update the customer status as Exception in the tracker and finally to validate with address column to see from Input sheet to see in the portal if Address if same and then to change in the portal card hold status as 'Returned Mail' and mark as completed in input sheet

Benefits:

- ØCost Savings: Automation reduces the need for manual labor in repetitive tasks
- ØAccuracy: RPA minimizes errors associated with manual data entry and processing
- ØEfficiency: Tasks are completed faster, leading to quicker customer service and reduced processing times
- ØCompliance: Ensures adherence to regulatory requirements by consistently applying predefined rules
- ØEnhanced Customer Experience: Faster responses and more accurate transactions contribute to improved customer satisfaction



ACH INCOMING & OUTGOING CHOICE BANK

Objective:

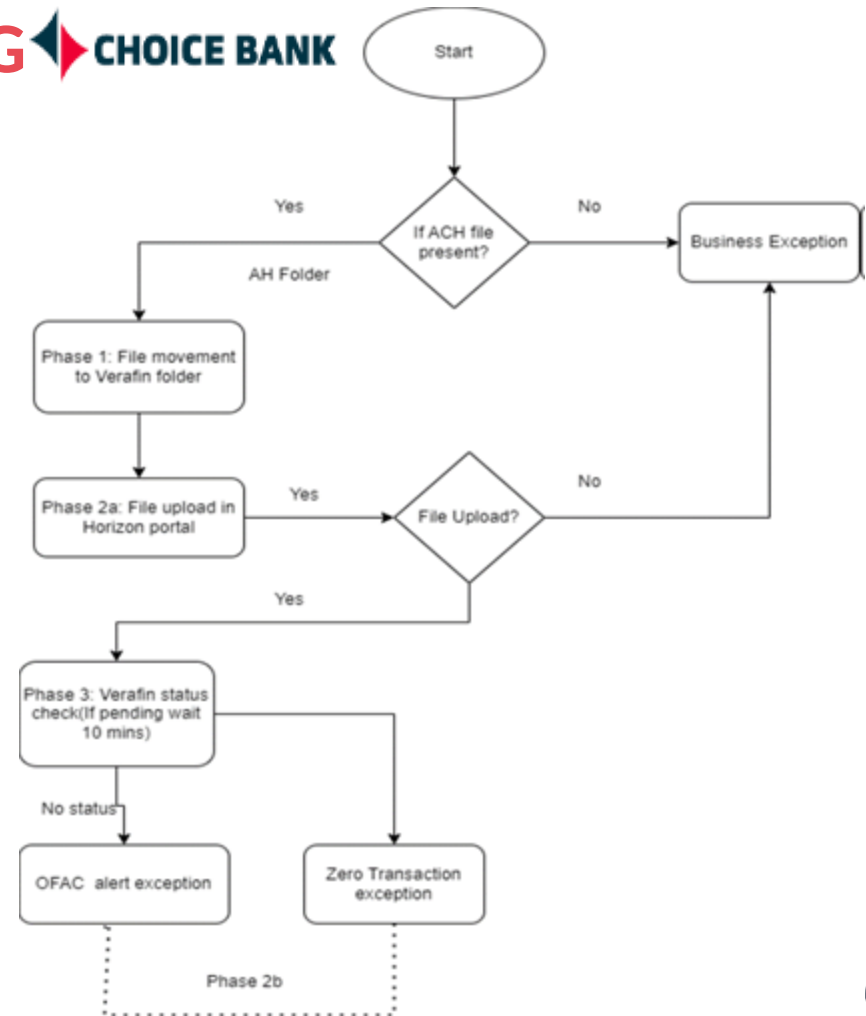
We will be receiving files in four different slots which needs to be picked and upload it to horizon portal and monitor for every 10 mins to clear the OFAC suspects and if any exceptions

Solution Overview:

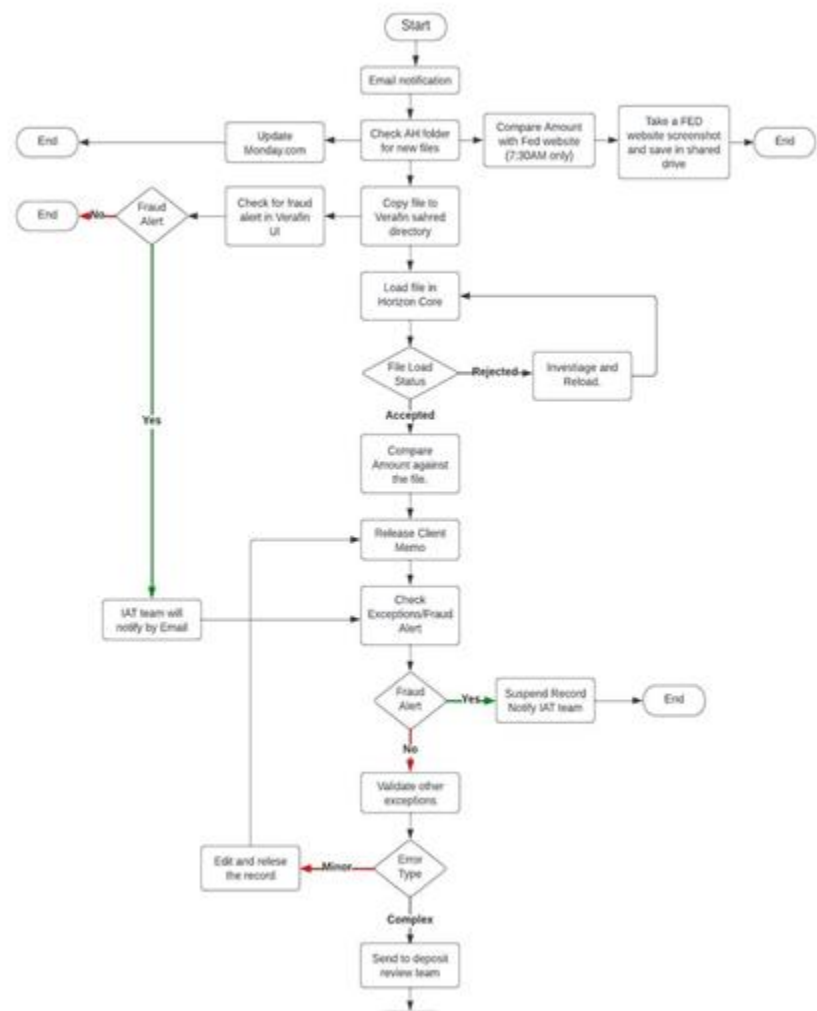
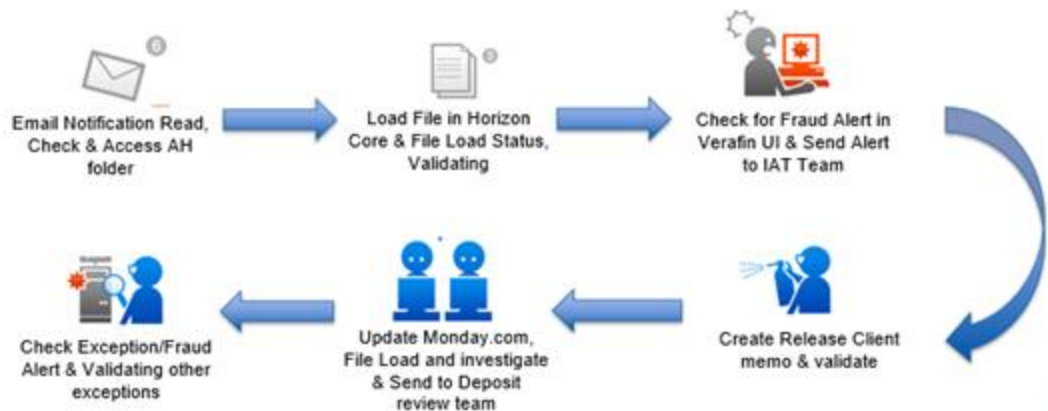
Movement of files to Verafin Folder and upload files in Horizon Portal and once file appears in Verafin Portal to check with the status if mentioned as pending and then bot to wait monitoring it until pre-defined time and then keep on recurring till it appears with “Yes” or “No” status. If once status mentioned as “Yes” then to perform OFAC validation and if status appears as “No” to clear all the exceptions and send an email to intended recipients

Benefits:

- Ø Cost Savings: Automation reduces the need for manual labor in repetitive tasks
- Ø Accuracy: RPA minimizes errors associated with manual data entry and processing
- Ø Efficiency: Tasks are completed faster, leading to quicker customer service and reduced processing times
- Ø Compliance: Ensures adherence to regulatory requirements by consistently applying predefined rules
- Ø Enhanced Customer Experience: Faster responses and more accurate transactions contribute to improved customer satisfaction



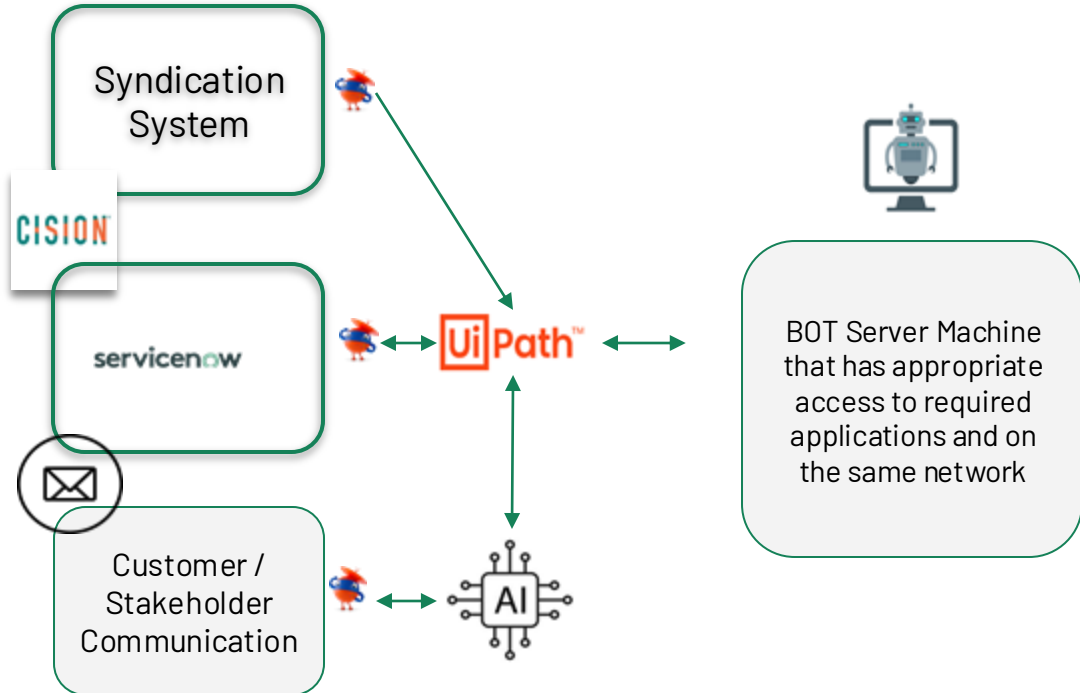
ACH INCOMING CHOICE BANK



L0 Support BOT

- Fast & Error free solution
- 24/7 uninterrupted response and alerts
- Scalable to support any integrated applications
- Can be augmented to a smart support system using AI and ML
- Support team can focus on L2 tasks and upskill further
- Maximum customer support and customer satisfaction guaranteed
- **ROI: More than 50% savings in cost**

Team Size	# alerts per month	Time Saving %	Response time	Resolution time
12	~ 100-300	< 5 mins	Immediate	< 1 day



Cision RPA Cost Benefits

Existing Team

- 12 members
- handling 100 incidents/month
- \$21/hr - \$43K/month (Approx)

BOT Implementation

- 4BOT
- \$12k/per yr (\$3k per BOT)
- Can handle 100+ incidents/day

BOT with cloud orchestrator (Full Potential)

- \$30k/per yr (15 unattended BOTS)
- Parallel execution

BOT benefits

- Tremendous reduction over cost & investment
- High ROI %
- Insights / Analytics availability
- Scalable & Capable of handling complex customization
- Large tech forum support
- Robotic Enterprise Framework / Re-Framework is a template that is used to create automation workflows in a modular approach for large scale deployments. One of the best framework methodology for automation workflows.
- Parallel BOT execution by queue system, greatly reduces time consumption to complete transactions.



Admission process - RPA



CUSTOMER: Torrens University - Australia

BUSINESS CHALLENGE: The objective was to automate Enrollment process and conform the admission by sending an offer letter.

ACCION RPA SOLUTION IMPACT:

-RPA implementation automated the Domestic admission process. All enrollments requests are analyzed and the documents submitted by applicant were verified.

-If the Enrollment met admission criteria for each category, then generate and share offer letter with applicant.

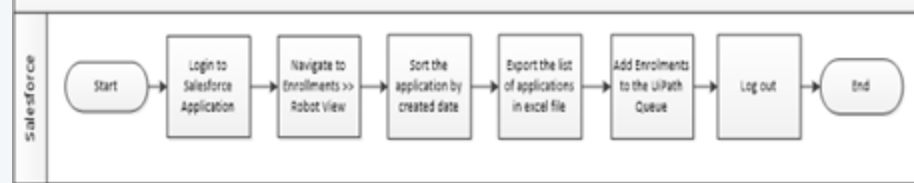
RPA Benefits:

-Reduced the manual effort involved and Processing time by 80%

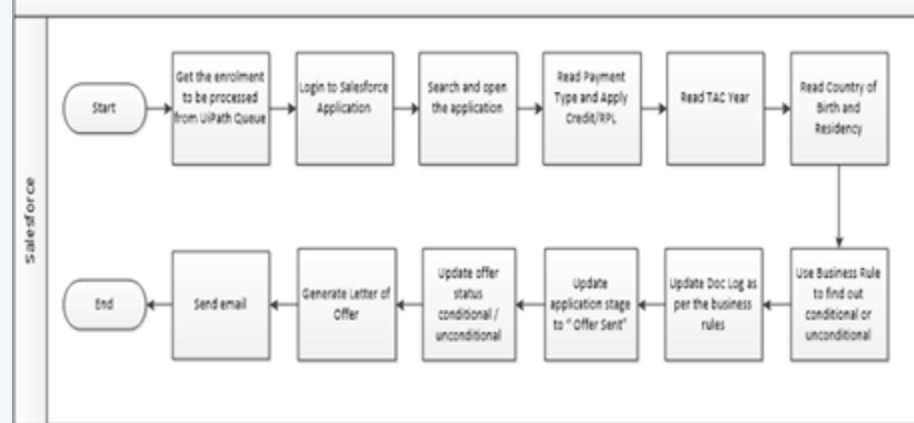
-Error free processing

RPA Process Flow

Domestic Admission - RPA Process flow (Queue Loading)



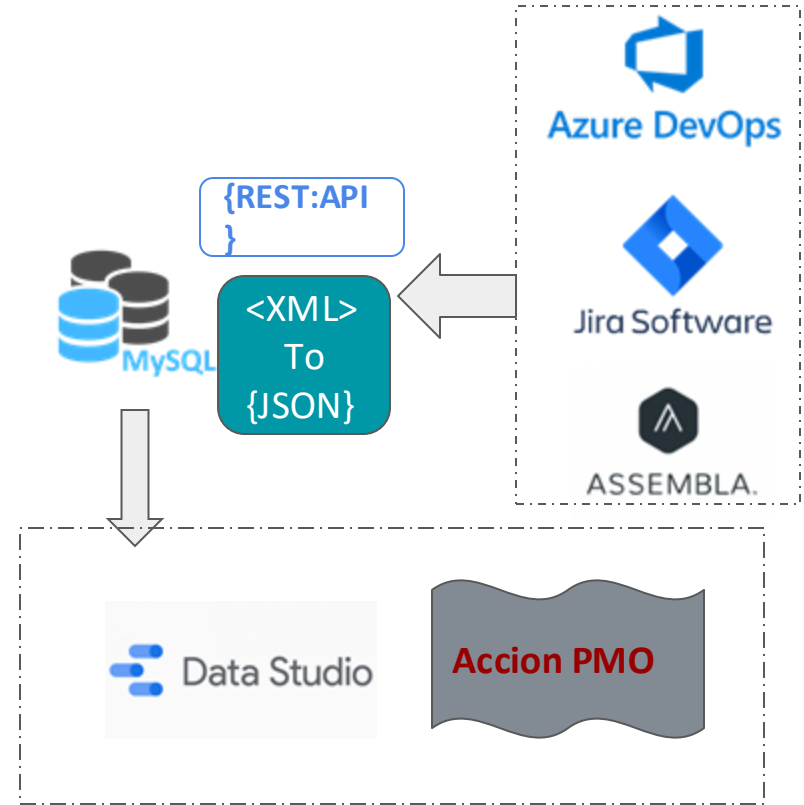
Domestic Admission - RPA Process flow (Process Application)



PMO - Executive Dashboard

Accion PMO BOT:

- Generic components built to retrieve incremental updates from any projects that are available in JIRA/Assembla/AzureDEVOPS.
- Extracted XML data are converted into consumable JSON format.
- Sprint report data are retrieved from above collaboration tools using REST API.
- All these data are then injected into MYSQL DB.
- Custom reports are developed specific to business requirements in DataStudio.
- Reports are embedded into WEB application for user interaction.



HR Greetings

Business Challenge:

To share employee greetings on various occasions.
Large manual effort involved in creating custom greetings and publishing emails.

RPA Implementation:

- BOT component retrieves employee support information from HRMS system.
- Selects random templates and creates GIF image using GIF creators.
- Draft and sends email HTML content with greeting image and supporting information for publishing.

RPA Benefits:

Independent & Error free process



HBD/
Anniversary

Happy
Programmers Day

Festival Greetings

Rewards /
Recognition



Return To Work (R2W) - Wellness Check

CUSTOMER: Everbridge

BUSINESS CHALLENGE: The objective was automate process of bringing employees back to work after COVID-19

ACCION RPA SOLUTION IMPACT:

Pre-configured incident templates are used to send wellness notification to employees allowing them to take self assessment. Based on response of their assessment, this package allows employers to auto approve employees to return back to work. Approval or non approval notification is sent to employee as well as stakeholders.

List of functionalities:

When an employee takes a survey

- Send approval or non approval notification to employee
- Send approval or non approval notification to stakeholders
- Enable/Disable personalized notification

RPA Benefits:

Millions of employees were returned to work with a clean bill of health with ease across various organizations around the globe



RPA - QE/QA



RPA in QE : Test Automation

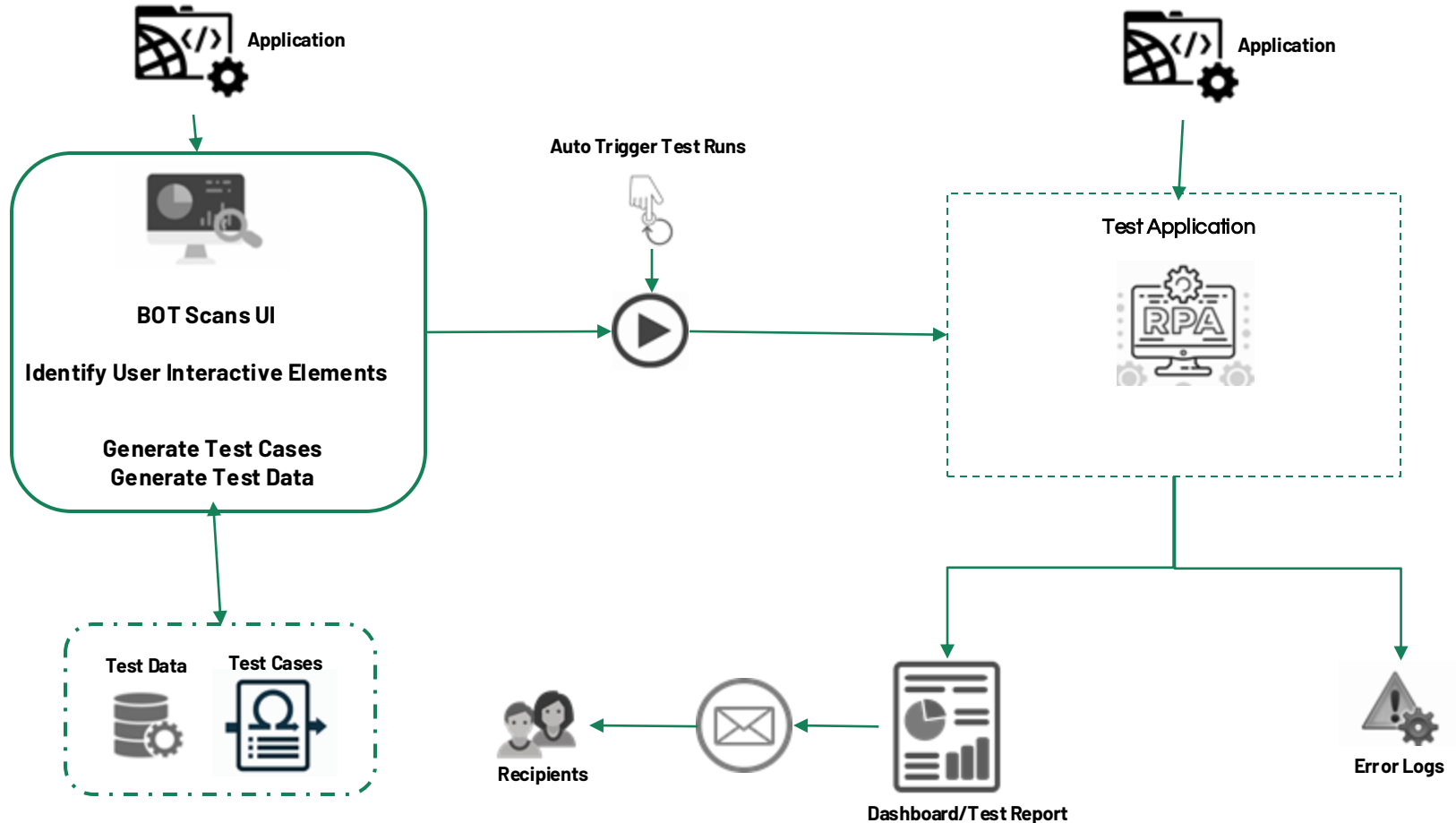
BUSINESS NEED FOR RPA:

- Automate test scenarios where Selenium based test framework could not cover
- Improve Efficiency - Regression and Smoke tests are performed manually
- Manual Re-Work - When a deviation is found as part of Sprint Story verification, the entire suite of test cases around the impact area are executed again manually
- Repetitive Runs - When a VCC core release happens, the entire suite of test cases are executed manually on four browsers (Edge, Chrome, Safari & Firefox)

Accion QE RPA Framework are explored with Everbridge & DELL



Test Framework Using RPA



Q&A ?

