

Digital Transformation: Common Use Cases for RPA to Enhance Document Processing



Extracted from: <https://www.cmswire.com/information-management/5-common-ways-companies-use-rpa-to-enhance-document-processing/>

With all the hype around Robotic Process Automation (RPA), it can be helpful to remember that the vast majority of the data running through RPA automation originates or terminates with a document. About 4 out of 5 falls into this category.

Unattended bots do not run on a user's workstation. Rather, they run on one or more physical or virtual machines tasked with performing more batch-oriented and longer running transactions. Unattended bots are custom-made to process documents that flow into the enterprise on their timetable, and where timely and hyper-accurate data entry into the downstream line of business systems is critical. We are talking about an organization's most important operational documents such as invoices, insurance claims, electronic medical records, shipping documents, etc.

So, here are the five most common ways companies are using RPA to enhance document processing:

1. Transactional Data Entry, or Straight-Through Processing

Transactional data entry is the mother of all unattended bot automation.

No matter the document, the processing pattern is often the same:

- Documents are acquired and ingested.
- OCR and machine learning auto-categorize documents and extract transactional data.
- Extracted data is validated against internal data sources.
- Validated data is automatically entered into a downstream line of business systems via the application's user interface (just like the user does it).
- Real-time prompts are generated and presented to skilled knowledge workers to handle exceptions.
- Transactions are recorded and logged for audit and compliance purposes.

RPA makes the promise of straight-through processing a reality. While transactional data entry is usually handled by unattended bots, there are many attended bot uses as well. The bang for your buck will vary depending upon document volume, duration of the transaction, and verification requirements.

2. Document Acquisition

Document acquisition is not always a simple task. While most document processing platforms can acquire documents from scanners, cameras, watch folders, and email accounts, this is far from an exhaustive list of the channels through which documents enter the enterprise. Many organizations are also forced to acquire documents from locations such as websites, FTP sites, EDI translators, and more.

RPA can lower order processing costs and raise order volume from the customers and increase customer satisfaction. It can be an incredibly powerful multi-channel document acquisition tool.

3. A Shortcut to Necessary Documents

The top reason organizations give for not centralizing their document repositories or duplicating documents across the line of business systems is the need to locate documents from different contexts. Meaning, accounting may need to retrieve an invoice from a supplier record within an ERP system, while an HR professional may need to view a change of life event form from within an EHRS.

Via an RPA attended bot, a "jump to" button can easily be placed onto any screen with no changes to the application required. When pressed, this button kicks off automation that extracts screen data to establish context and then uses that data to "jump to" the related document. The attended bot functions as a universal adapter that can determine application and data context for a given user and

present the user with the right document(s). The possibilities of creating a powerful, contextually hyperlinked experience among data, documents, and system records are endless.

4. QuickCopy

Despite the power of Machine Learning and its ability to perform document auto-classification and data extraction, many documents are still manually indexed or supplemented with metadata from the line of business systems. “Quickcopy” is the process by which a user opens a record in a line of business system, and via the same button described above, kicks off automation that extracts select pieces of data from one or more application screens, and then quickly copies them to the metadata fields of the open document.

5. Document Assembly and Forms Extraction

Document assembly and forms extraction have been around forever. By leveraging the power of RPA, any application screen(s) can easily be used as the source to assemble a document, or as the destination for data extracted from a form. In the case of document assembly, data is extracted from application screens and assembled into a document or email. Think of it as a universal mail merge capability that can be added to any application that assembles or injects data into any document.

Forms extraction is just the other side of the same coin. In this case, data is extracted from a form and inserted into the fields of an open application record. Document assembly and forms extraction are equally used by both attended and unattended bots.

RPA and document processing go together to boost productivity like peanut butter and jelly. Borrowing from these five patterns can inject greater efficiency into the productivity-draining tasks that could be slowing down your organization.

You can contact me at <https://www.linkedin.com/in/manuelbarragan/> if you need to know how to be successful in your **Digital Transformation** journey.