

IBM adds new Robotic Process Automation including Automation Anywhere Offering

NA Hursley Summit

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outthink limits

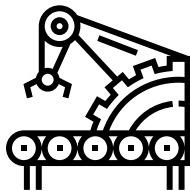
#IBMCloud

Topics

RPA Overview

IBM DPA and RPA Offering with Automation
Anywhere

Software Robots are similar to Physical Robots

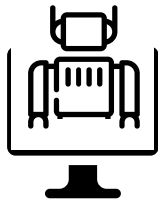


Physical robots

Perform repetitive **physical** tasks

Example:

- Pick eight chocolates from assembly line
- Assemble a finished box of chocolates



Software robots

Perform repetitive **software** tasks

Example:

- Log in to four different systems
- Navigate legacy screens to retrieve data
- Use data to open new account in system of record

ROBOTIC PROCESS AUTOMATION (RPA)

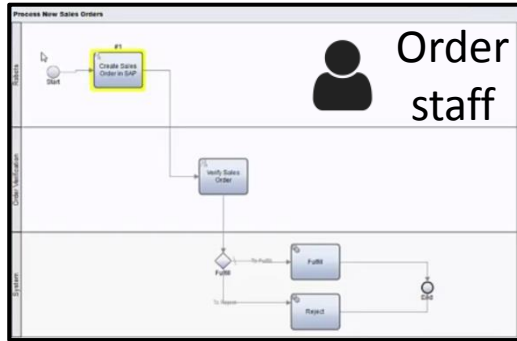
enables companies to easily automate mundane, repetitive tasks in order to free up employees to perform higher value work.

HOW RPA WORKS:

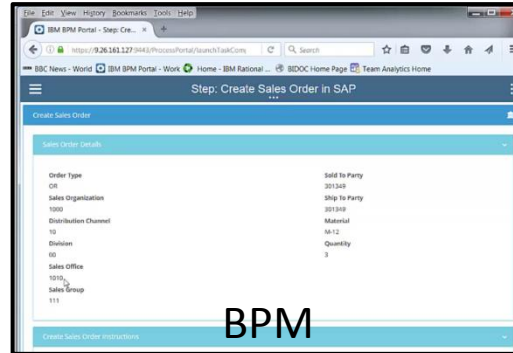
RPA 'bots' replicate the actions of humans interacting with application user interfaces

- No changes to existing interfaces
- Reduces swivel chair integration
- Efficiently execute high volume work

Example: RPA and BPM in Action



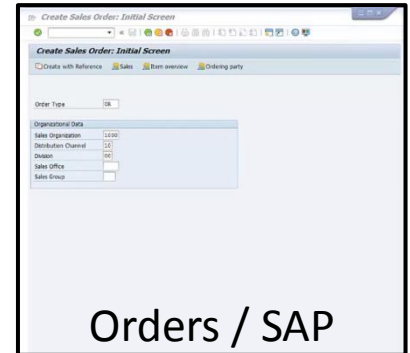
Process V1: human
Create Sales Order task



BPM



Manually
Copy

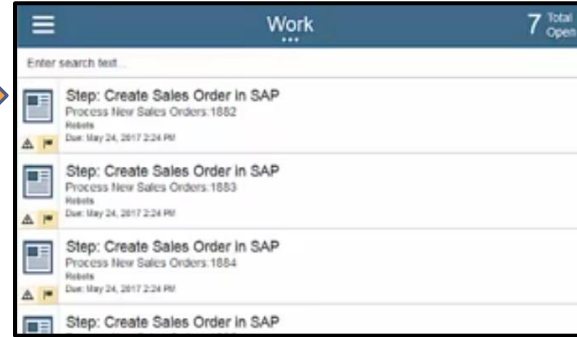
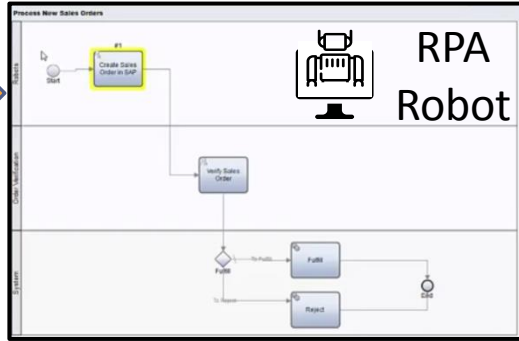


Orders / SAP

Example: RPA and BPM in Action

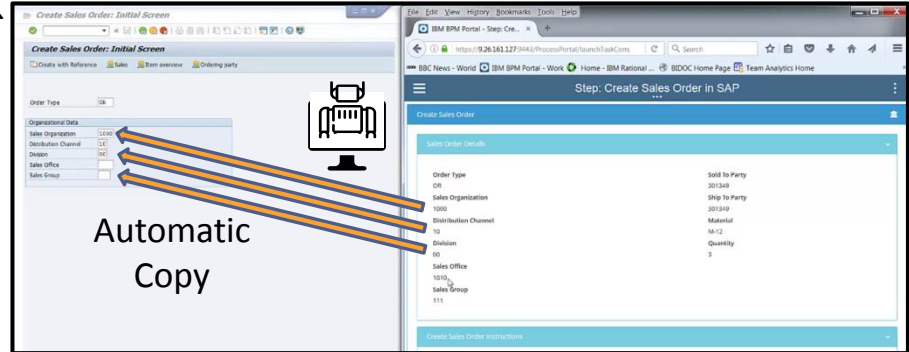


Use RPA to record
UI activity and
develop Robot to
automate work

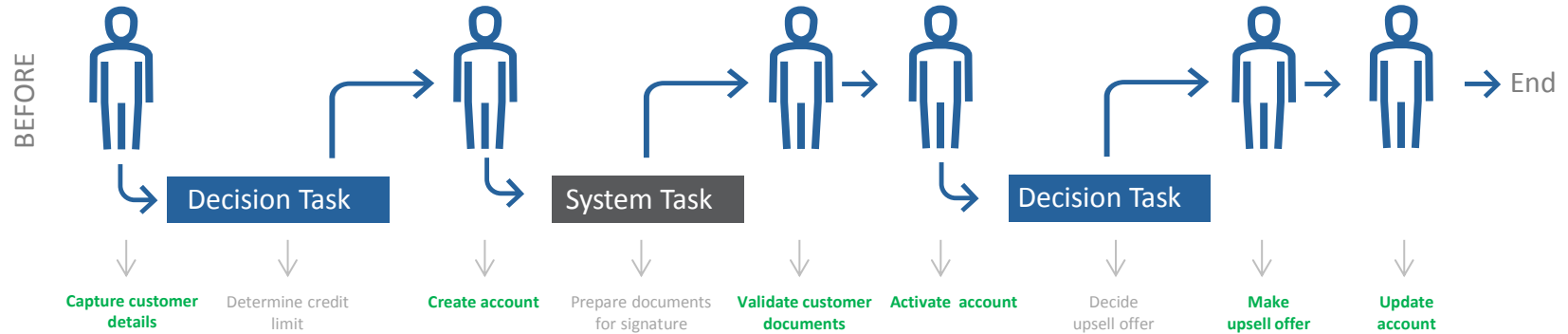


Process V2: robot
Create Sales Order task

Robot monitors work tasks assigned
to it and completes

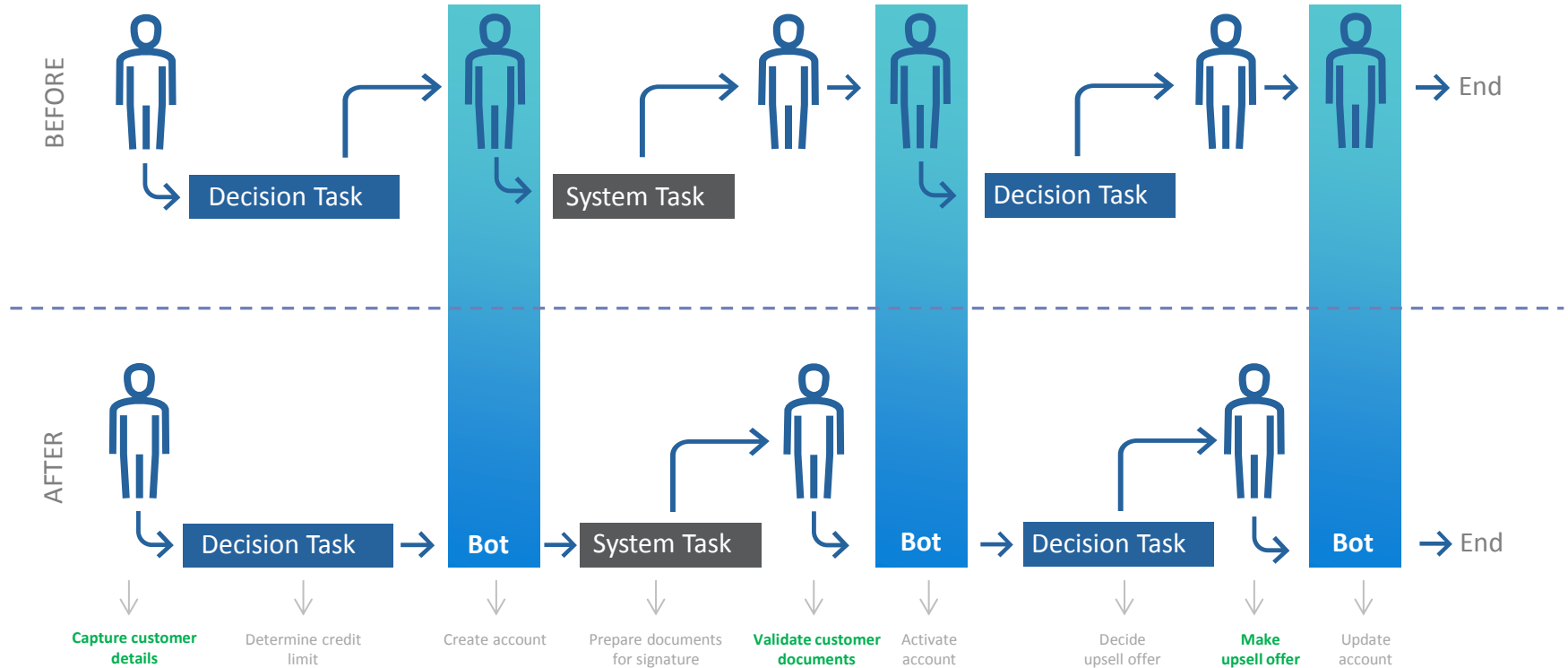


Processes typically involve humans decisions and system activities



Account Opening Process

RPA simplifies human task automation

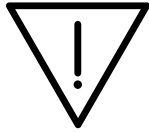


Key Benefits of Robotic Process Automation



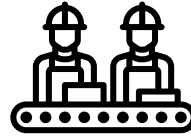
Accelerate time to value

Create, test and deliver new automations in days or weeks



Reduce human error

Eliminate copy/paste mistakes introduced by swivel chair integration



Increase throughput

Fulfill automated tasks in seconds or minutes, round the clock



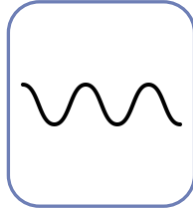
Decrease development costs

Develop automations quickly with simple record/playback functions

RPA Selection Criteria



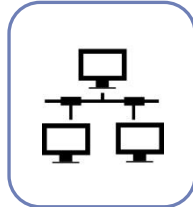
**High
Volume**



**Repetitive
Tasks**



**Manual
data entry**



**Multiple Legacy
Systems**



**Logic & rules
based processes**



**High FTE
Number**

RPA Use Cases



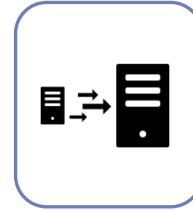
Multiple Data Sources

- Data transfer between systems
- Matching data between systems



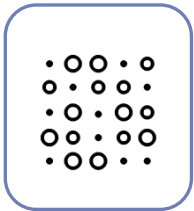
Swivel Chair

- No back-end integration available
- Integration is only possible via the UI



System Migration

- Integration with legacy systems
- Migration of data between systems with no integration



Unstructured Inputs

- Extract data from documents (e.g. email, faxes, paper forms)
- Convert unstructured text to structured data



Pre - checking

- Automate high volume of checks
- Filter out simple cases
- Refer to users for exceptions



New Systems

- New systems with missing functionality
- Impossible or too expensive to customize
- Workarounds needed

RPA Challenges



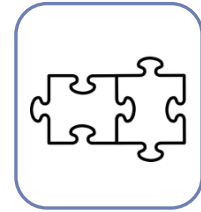
Fragility & exception handling

- Robots are designed to work in a specific way. They are not designed for change or agility
- 30% of robotic automations need exception handling



Requires process analysis

- Understand processes and select the right activities to automate
- Robots do not have Human task, Case, complex Rule capabilities
- RPA is not always the right answer to an process automation problem



Requires Business & IT Sponsorship

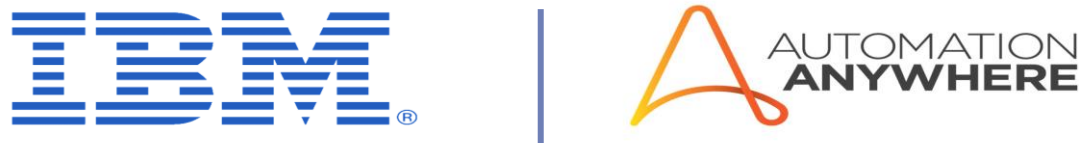
- Business and IT need to work together
- Governance of new business and IT changes
- A CoE for all automation technologies is needed (not just RPA)

Topics

RPA Overview

IBM DPA and RPA Offering with Automation
Anywhere

Announcing a new partnership with Automation Anywhere



Specifics of the partnership:

- IBM and Automation Anywhere join forces to create a new RPA offering within the IBM Digital Process Automation portfolio
- Announcement date was July 13th 2017. IBM will provide an offering on 22nd September 2017
- IBM Services will continue to consult on & implement the continuum of Digital Process Automation and Robotic Process Automation solutions

RPA adds complementary value to IBM DPA platform



IBM Digital Process Automation

Automate processes

- Automation and management of :
 - Human-centric & straight-through processes
 - Ad hoc processes & cases
 - Business rules & operational decisions

Maintain visibility

- KPIs track performance across each business process & customer journey
- Process SLAs specify performance targets for end-to-end process execution
- SLAs can be set to take appropriate action if performance is at risk

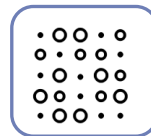
Continuously iterate and improve

- Rapid modeling, configuration, testing & deployment
- Graphical process models can be understood & edited by both business & IT
- Built-in change management & lifecycle governance

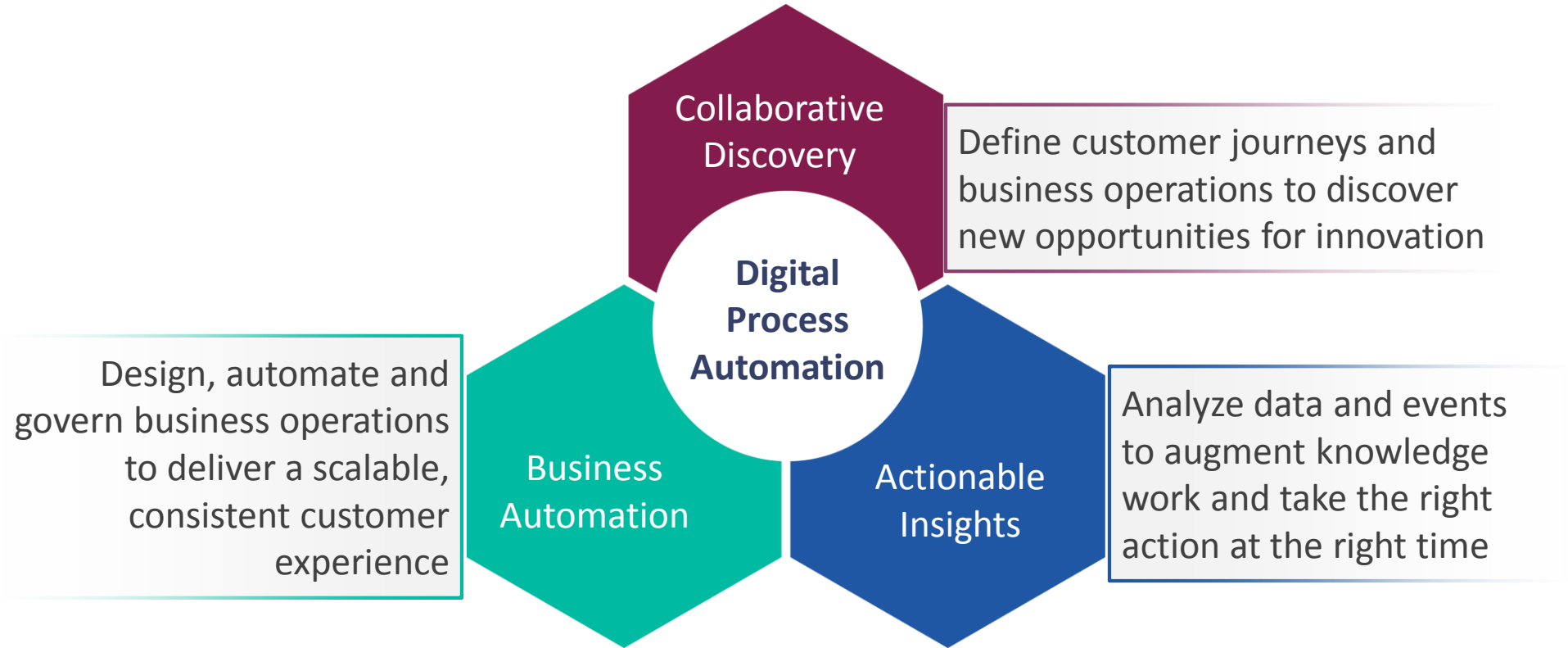
RPA

Lowers the barriers to

- Automate repetitive tasks & processes
- Eliminate swivel chair integration
- Reduce data entry errors
- Integrate applications with no APIs
- Automate data access from documents



Digital Process Automation



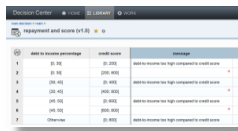
IBM Business Automation with Automation Anywhere RPA



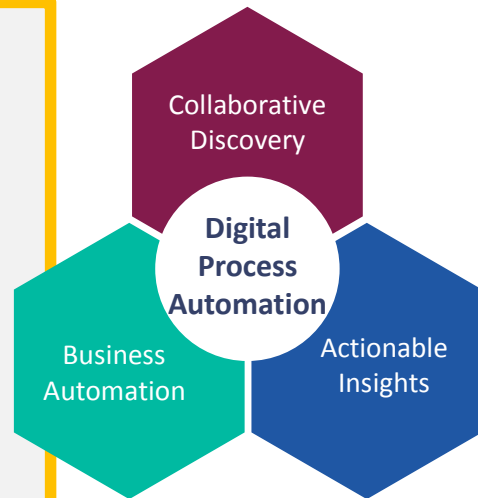
Orchestrate human and automated service tasks
IBM Business Process Manager (BPM)



Automate human tasks
Automation Anywhere Enterprise
Robotic Process Automation (RPA)



Automate business logic
IBM Operational Decision Manager (ODM)





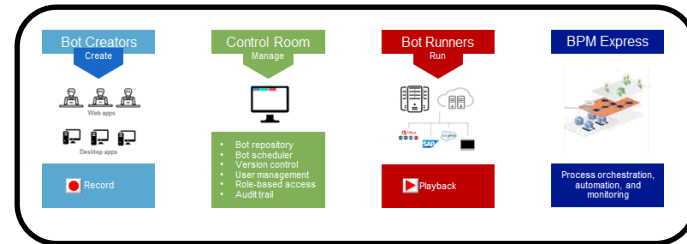
IBM Robotic Process Automation with Automation Anywhere V10

Available – 22nd September 2017

Combines Automation Anywhere Enterprise
with IBM Business Process Manager Express

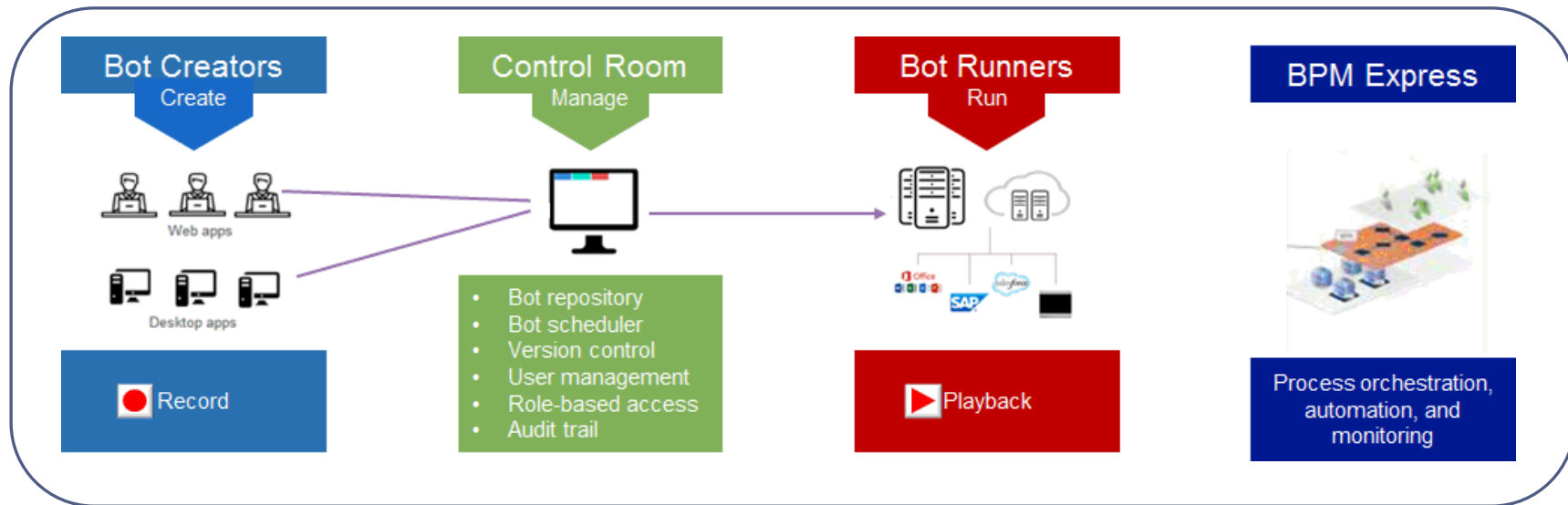
Provides Platform for
Automated Repetitive Tasks,

Process Orchestration and Human Tasks



Platform

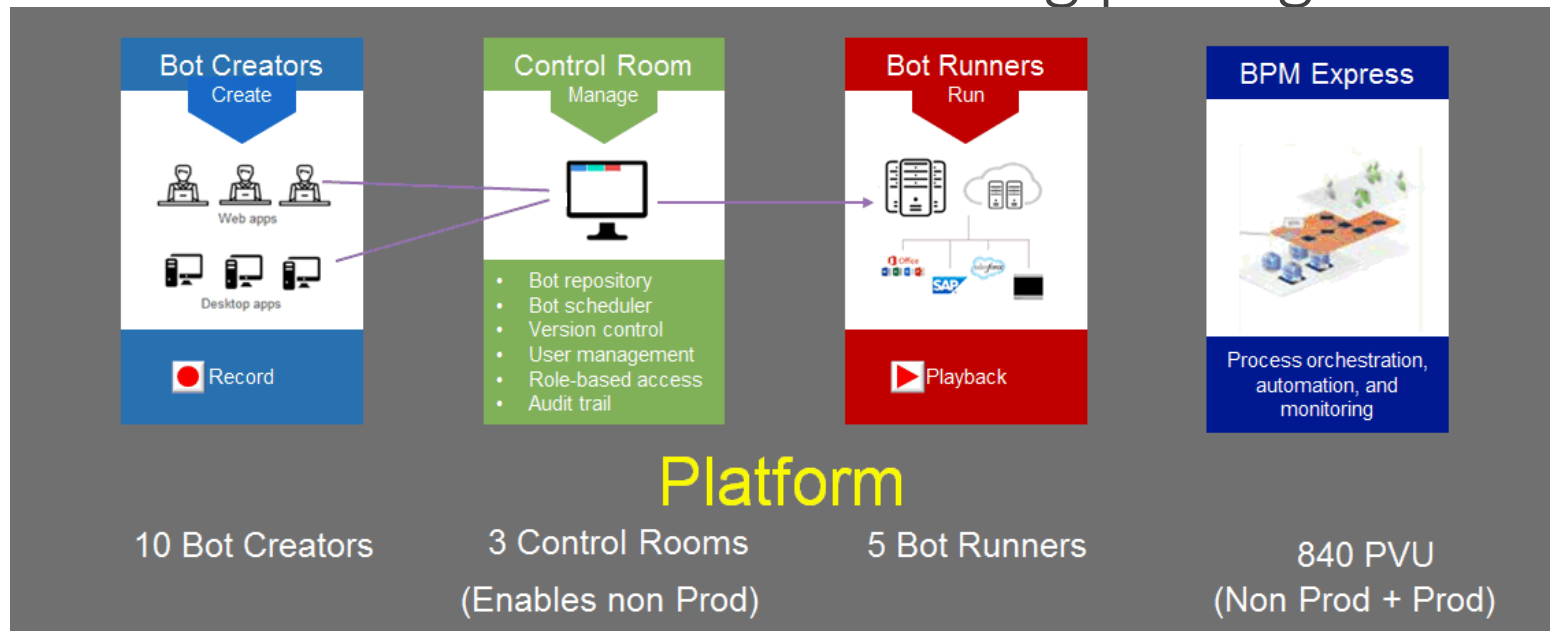
What's New in IBM RPA with Automation Anywhere ?



- Front-end automation
- Multi system integration
- Structured data
- Enterprise scale

- End-to-end (human, system and bot) task orchestration
- Human based exception management
- Limited IBM BPM license

How is the IBM RPA offering packaged ?



Note: each component's quantity refers to virtual servers (i.e. Platform includes 3 virtual servers of Control Room)

Easily Create Bots with Recorders

Create

Manage

Run

Use Recorders to record interactions between applications



Record

Choose an Option 

Smart Recorder



Screen Recorder



Web Recorder



Smart Recorder: Record web & desktop application screens, independent of screen size or window location

Screen Recorder: Record web & desktop application screens when screen size & window location don't change

Web Recorder: Special features for recording web applications

Edit Bots with the Task Editor

Create

Manage

Run

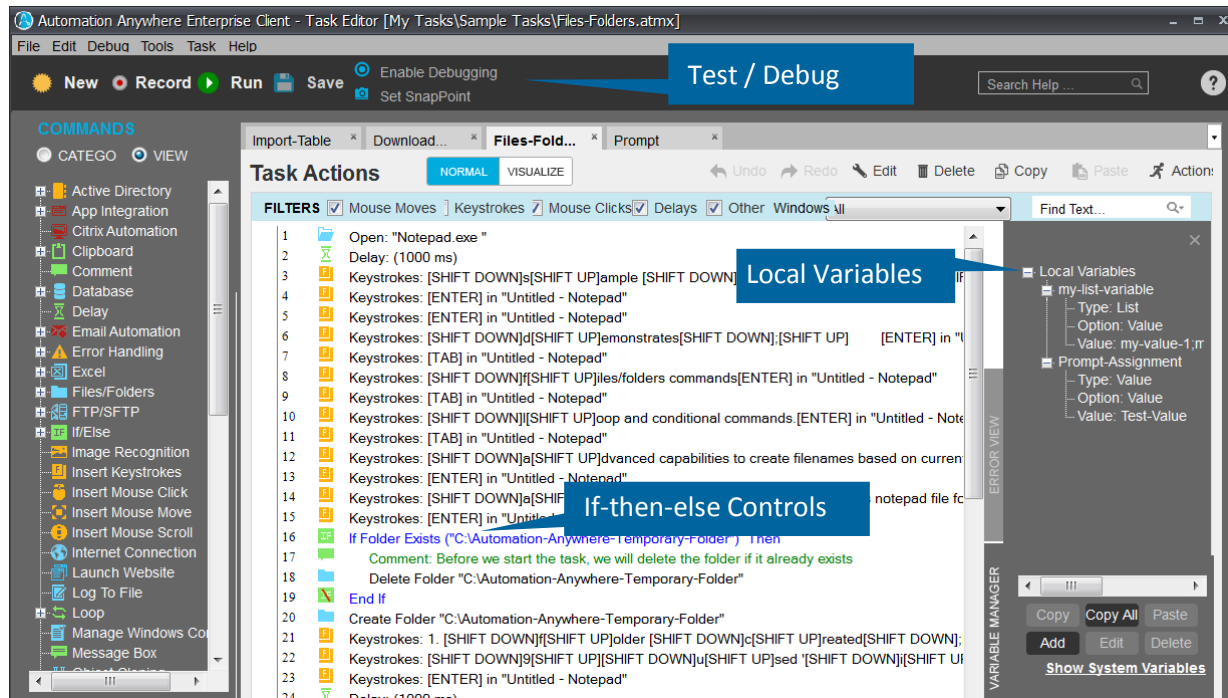
Variables to for data exchange between bot steps

Data Acquisition form from input files or other systems

Loops to iterate thorough bots

If-then-else for control flow

Error Controls for exception handling

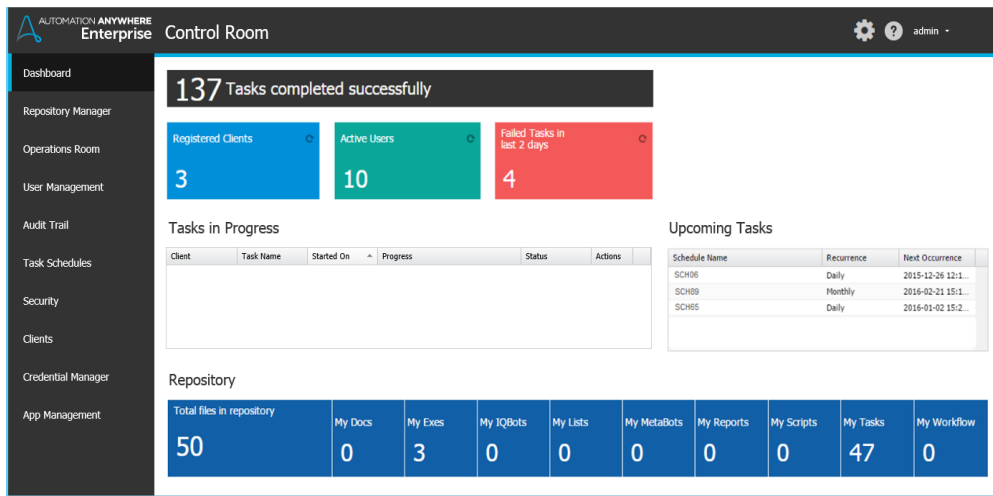


Manage & Schedule Bots from Control Room

Create

Manage

Run



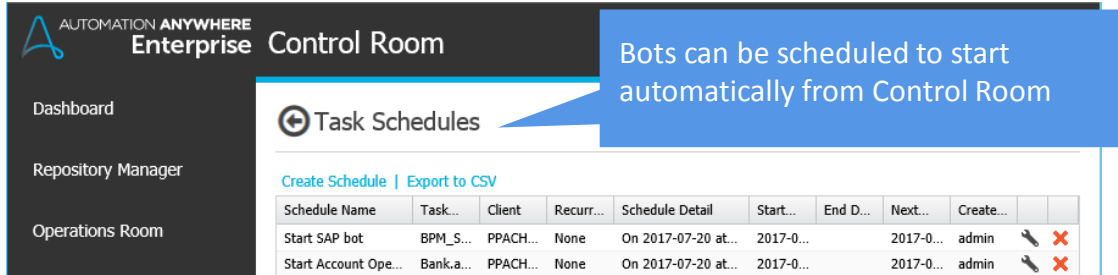
- **Dashboard** to view bot activities
- **Repository Manager** to manage uploaded bots
- **Task Scheduler** to deploy bots to Bot Runners and manage bot dependencies
- **Operation Room** to view the control room history and tasks in progress
- **User Management** to configure users (developers, Bot Runners, administrators)
- **Audit Trail** to displays all Control Room events

Run Bots Automatically or Launch from Desktop

Create

Manage

Run

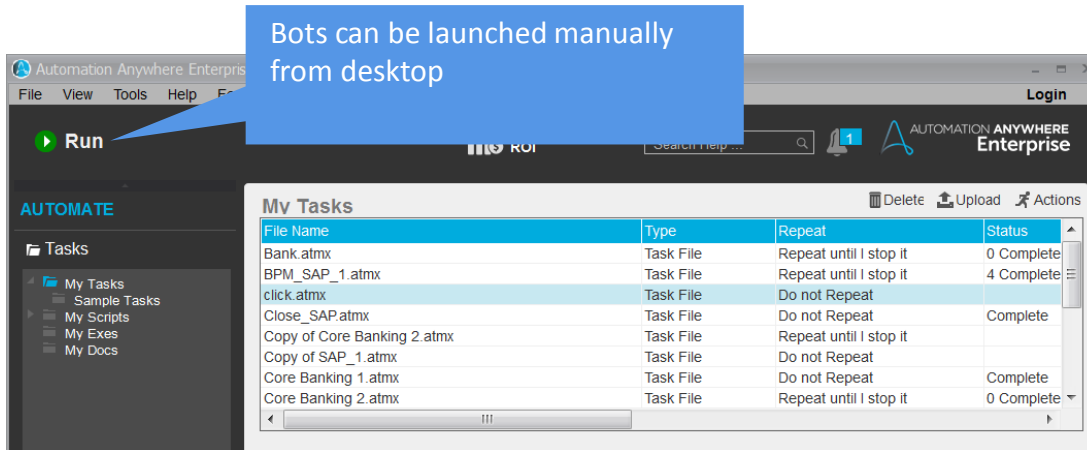


Automation ANYWHERE Enterprise Control Room

Dashboard
Repository Manager
Operations Room

Task Schedules
[Create Schedule](#) | [Export to CSV](#)

Schedule Name	Task...	Client	Recurr...	Schedule Detail	Start...	End D...	Next...	Create...		
Start SAP bot	BPM_S...	PPACH...	None	On 2017-07-20 at...	2017-0...		2017-0...	admin		
Start Account Ope...	Bank.a...	PPACH...	None	On 2017-07-20 at...	2017-0...		2017-0...	admin		



Automation Anywhere Enterprise

File View Tools Help

Run

My Tasks
Delete Upload Actions

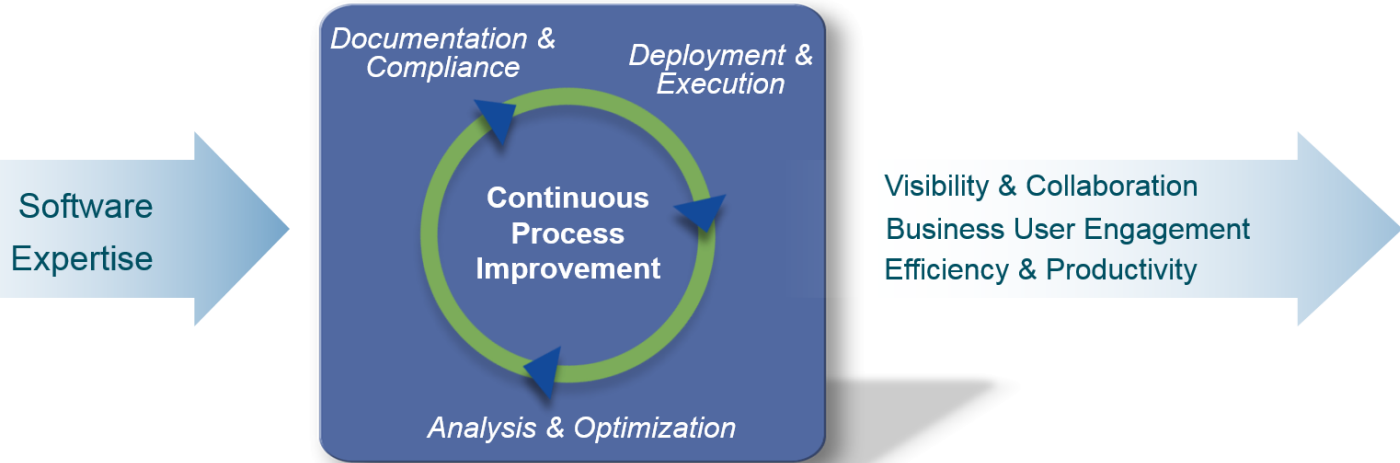
File Name	Type	Repeat	Status
Bank.atmx	Task File	Repeat until I stop it	0 Complete
BPM_SAP_1.atmx	Task File	Repeat until I stop it	4 Complete
click.atmx	Task File	Do not Repeat	
Close_SAP.atmx	Task File	Do not Repeat	Complete
Copy of Core Banking 2.atmx	Task File	Repeat until I stop it	
Copy of SAP_1.atmx	Task File	Do not Repeat	
Core Banking 1.atmx	Task File	Do not Repeat	Complete
Core Banking 2.atmx	Task File	Repeat until I stop it	0 Complete



Playback

Business Process Management (BPM)

End to end process orchestration of the customer journey which may span a spectrum of work patterns; from the structured and repeatable, to the ad-hoc and dynamic

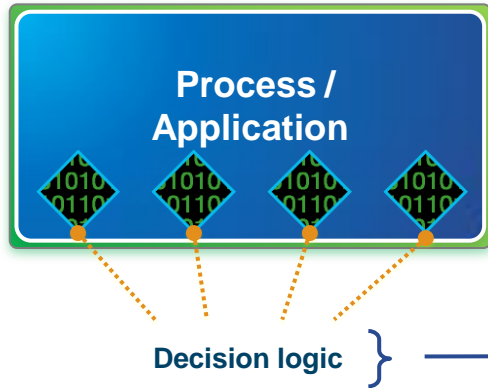


BPM is a management discipline focused on improving corporate performance by managing a company's business processes. This holistic management approach aims to align business processes with changing business needs by continuously focusing on optimizing them

(Paul Harmon, www.bptrends.com)

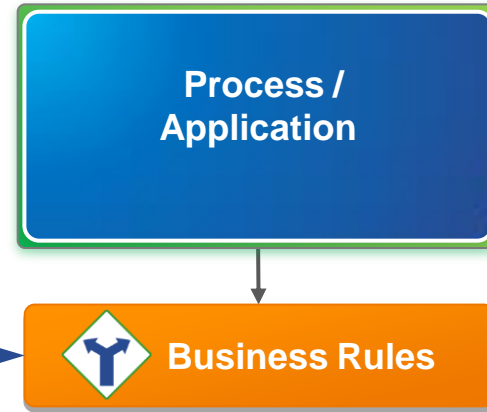
Operational Decision Management (ODM)

Without Decision Management



- Rules written in software code cannot be read by business people
- Hard coded rules are difficult to change
- Rules intertwined within applications cannot be reused by other systems

With Decision Management



- Natural language rules can be easily read
- Externalized rules are easy to change
- Centralized rules enable reuse and consistency

The Benefits of RPA and DPA

Benefits of BPM

Orchestrate Systems, Humans

Agile, Visible, governed processes

Enhance Customer Journey

Benefits of RPA

Automate repetitive human tasks

Fast Integration on the Glass

Scale Up/Down with no headcount

Benefits of ODM

Automate business logic

Agile, governed changes

Reduce process variance

Benefits of BPM, RPA and ODM

Enhanced Productivity

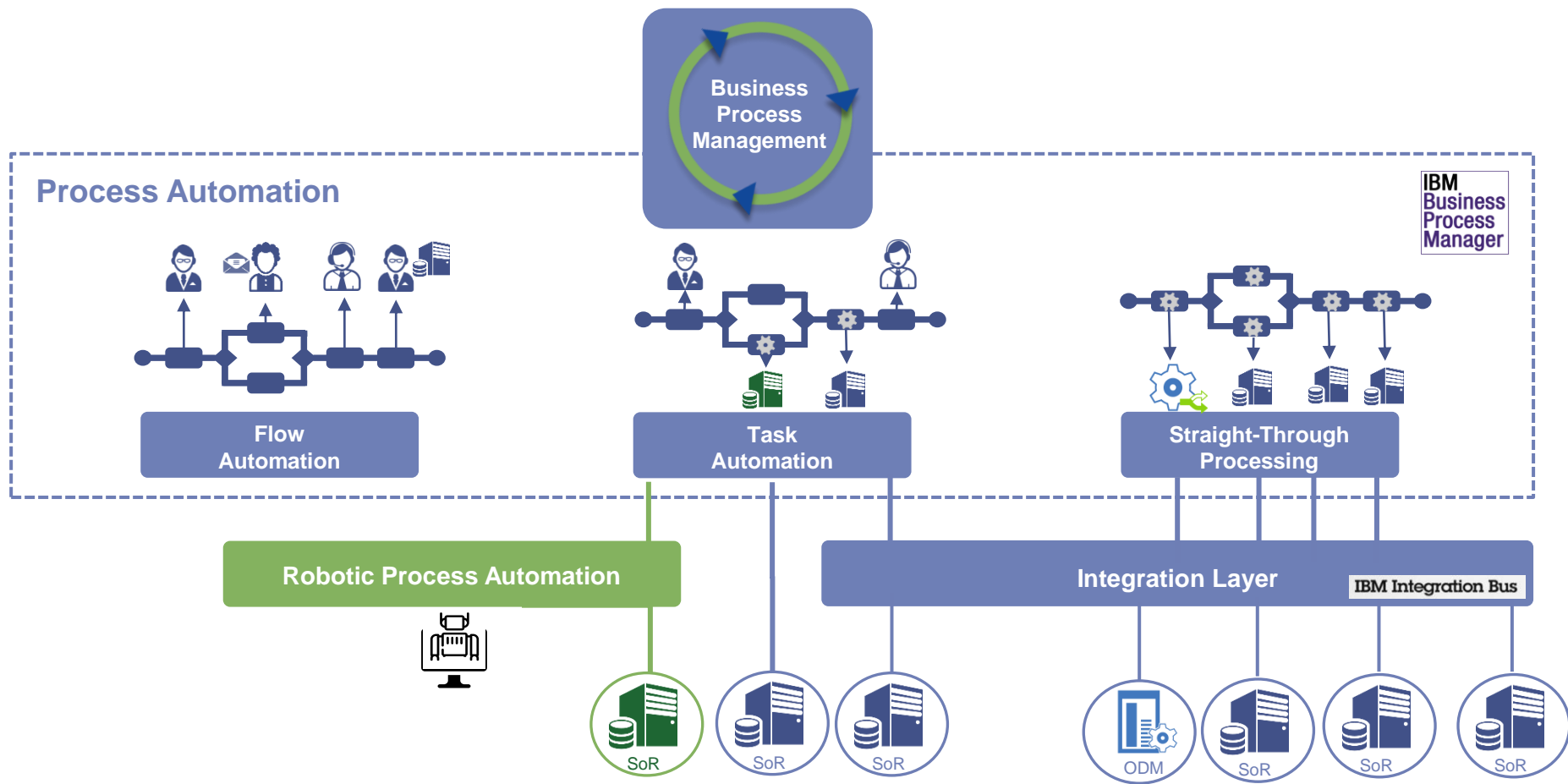
Low Code Automation

Reduce Headcount and Dev Cost

Reduced Time to Value

Increased Volumes and Scalability

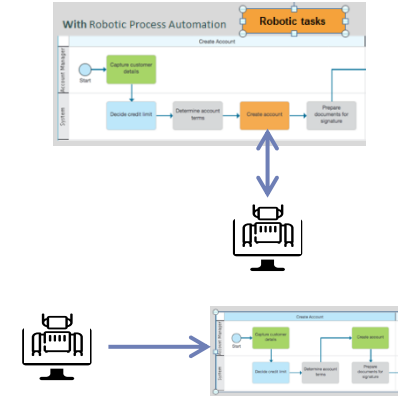




The 3 Main Integration Patterns of DPA and RPA

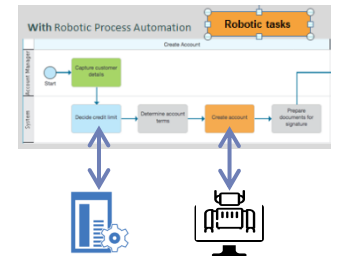
BPM & RPA

1. Within BPM, refer specific tasks to automated RPA (Bots)
2. Within RPA, trigger a BPM process or send events especially where it requires human task management



BPM, RPA and ODM

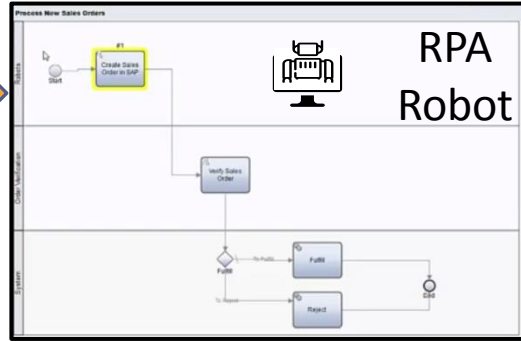
3. Within BPM, refer specific tasks to a combination of automated RPA (Bots) and automated ODM decisions



Example: RPA and BPM in Action



Use AA RPA tools to record UI activity and develop Robot to automate work



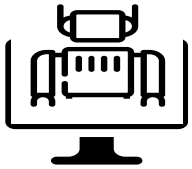
Work		7 Total Open
Enter search text...		
Step: Create Sales Order in SAP	Process New Sales Orders:1862	
Rebelle		
Due: May 24, 2017 2:24 PM		
Step: Create Sales Order in SAP	Process New Sales Orders:1863	
Rebelle		
Due: May 24, 2017 2:24 PM		
Step: Create Sales Order in SAP	Process New Sales Orders:1864	
Rebelle		
Due: May 24, 2017 2:24 PM		
Step: Create Sales Order in SAP		

Process V2: robot
Create Sales Order task

Robot monitors work tasks assigned
to it and completes

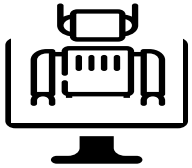
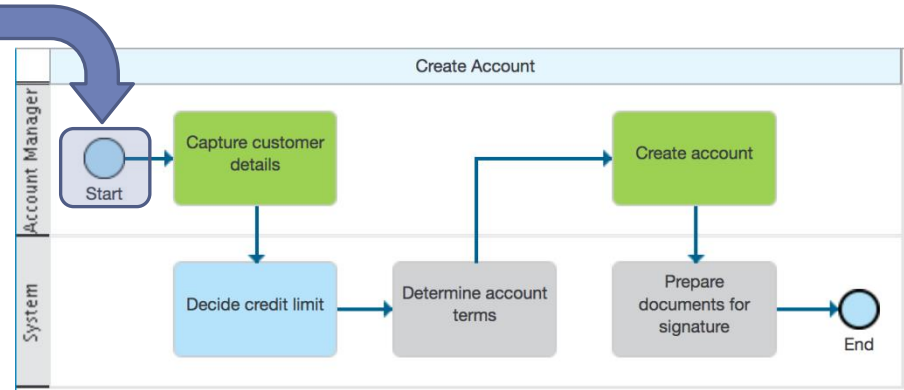
Step: Create Sales Order in SAP	
Create Sales Order Details	
Order Type	Sold to Party
01	20149
Sales Organization	Ship to Party
1000	20149
Distribution Channel	Material
05	64-2
Division	Quantity
60	3
Sales Office	
1010	
Sales Group	
111	

2. RPA triggers BPM



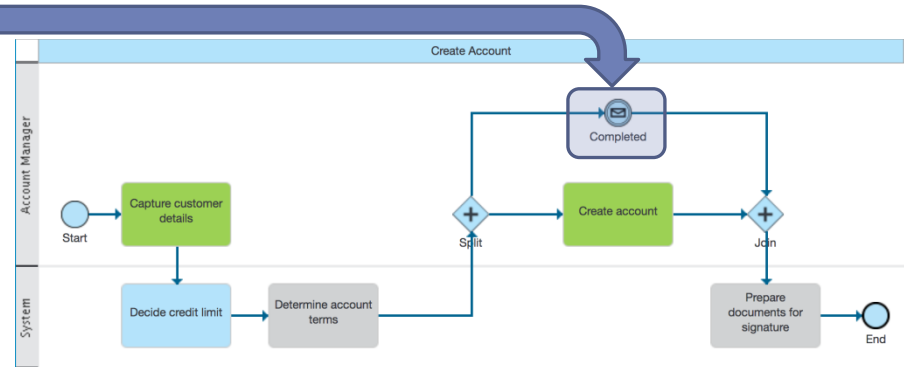
Trigger a new process

- Exceptions in RPA that require humans
- When certain conditions are met



Send an event to process

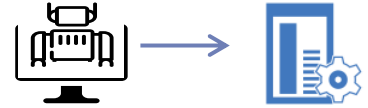
- Update long running process



Some RPA platforms can invoke ODM decisions

RPA and ODM

4. Within some RPA offerings, bots can use external ODM decisions where conditional rules change more frequently than the bot.

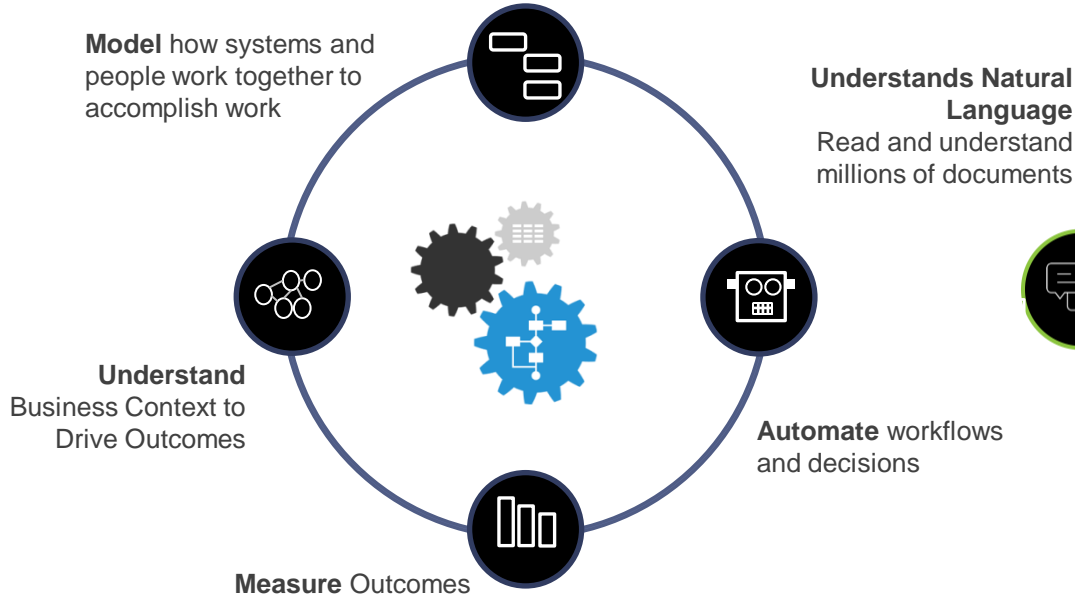


Pricers, risk or fraud analysts update and govern the rules directly.

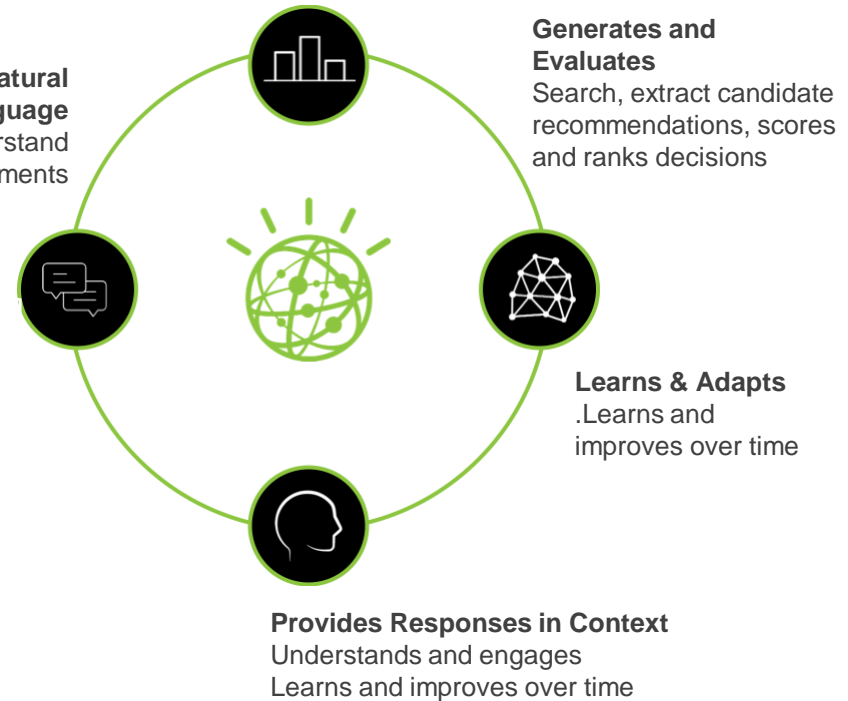
	date to incident percentage	credit score	coverage
1	[0, 10]	[0, 600]	add to income too high compared to credit score
2	[0, 10]	[600, 650]	add to income too high compared to credit score
3	[10, 40]	[0, 600]	add to income too high compared to credit score
4	[10, 40]	[600, 650]	add to income too high compared to credit score
5	[40, 100]	[0, 600]	add to income too high compared to credit score
6	[40, 100]	[600, 650]	add to income too high compared to credit score
7	Otherwise	[0, 600]	add to income too high compared to credit score

Automation and Cognitive

Automation: RPA, BPM, ODM

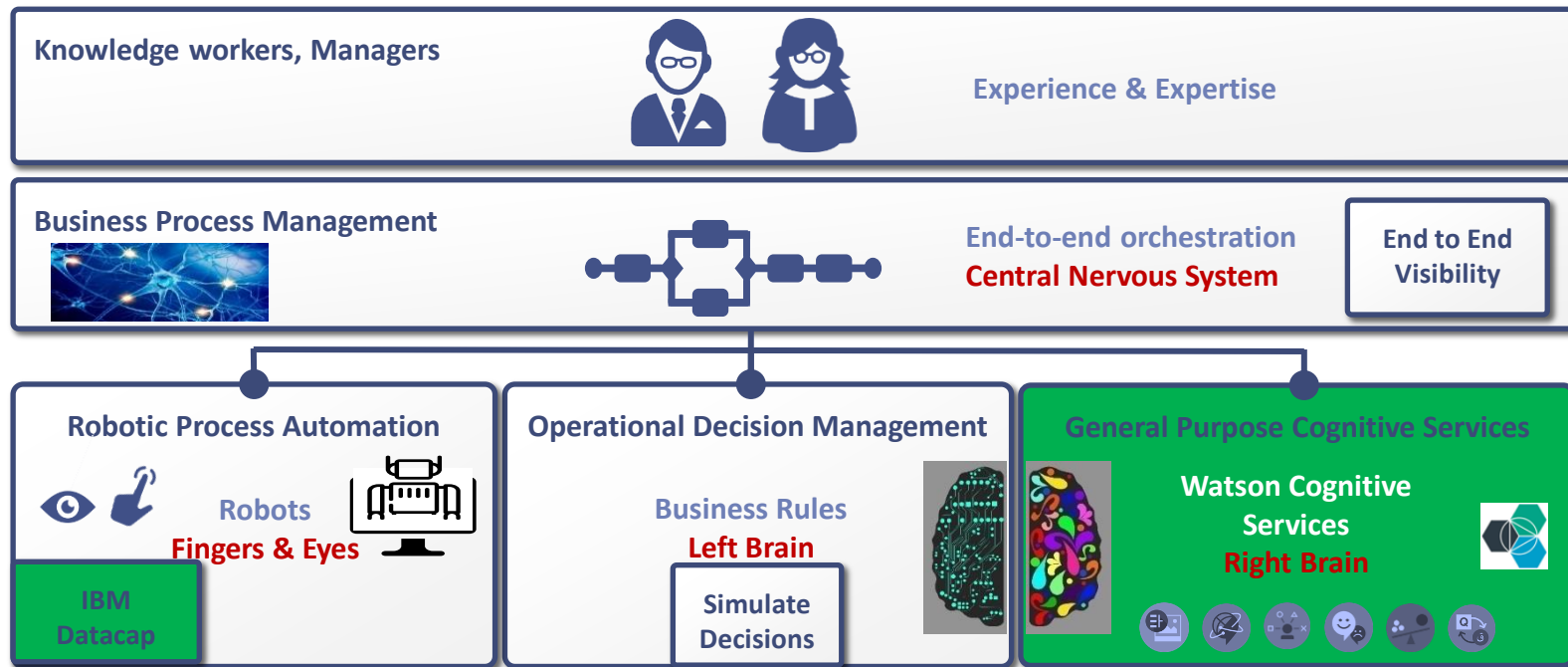


A Cognitive System



Combining Cognitive with DPA and RPA

Infuse cognitive capabilities into your processes and decisions



How to get started ?

[IBM Cloud](#) > [Products](#) > [Digital process automation](#) >

IBM Robotic Process Automation with Automation Anywhere

Automate high-volume, repeatable tasks to free your employees to focus on higher-value initiatives with IBM's newest digital process automation (DPA) offering

[Register to try the offering](#)

[Register for a consultation](#)

Create a digital workforce to automate repetitive tasks

IBM and Automation Anywhere, Inc. have worked closely together to combine robotic process automation (RPA) with IBM's DPA capabilities to maximize the automation opportunities within your business processes. And so IBM Robotic Process Automation with Automation Anywhere was born.

IBM Robotic Process Automation with Automation Anywhere can be used to create a digital workforce to automate repetitive tasks, maximizing your knowledge workers' productivity by allowing them to focus on higher-value activities. The offering combines Automation Anywhere's RPA platform and the IBM Business Process Manager Express solution, with its simple interface to the process execution, monitoring and optimization engine.

[Learn more about Automation Anywhere](#)

[Read the press release](#)



Talk to an expert



Appendix



out**think** limits

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