Robotic Process Automation (RPA)

Robotic Process Automation (RPA) is the use of our software to replicate the repetitive user actions of a human being on a computer system, thus saving time, resource and cost.

Major Benefits

- Software Robots execute business steps identical to a human user.
- Human like GUI level interaction, using the normal application front-end. No API instrumentation.
- Ideal for ‘swivel chair’ processes, where employees take data from one application to another.
- Multiple business process work items and transactions, executed in parallel at cost effective times.
- **Automate repetitive processes** freeing up labour resource.
- Platform independence (Java). RPA robots run on, and automate all major systems, such as Windows, Mac, Linux, Unix, Solaris, and mobile platforms.
- Automate ANY system. As automation runs at the GUI level, the tool can automate all applications. E.g. Java, C++/C#, .NET, HTML (web/browser), command line interfaces; also, applications usually considered impossible to automate like HTML5 etc.
- **Record & Playback** of business processes.
- Open architecture with extension interface allows easy customisation and integration. E.g. Optical Character Recognition (OCR), or integration with a relational DB via JDBC.
- Powerful group image search allows changing of window layout, button position etc.
- Object search & background detection to detect objects by colour, by colour range, and on different backgrounds.
- All controlled from the Robotic Automation Portal (RAP) management dashboard.

T-Plan’s RPA Robot is the most flexible and universal black box automation tool, on the market. Our virtual workforce solution is used by individuals and organizations of all sizes, to automate business processes of any complexity. Providing a human-like approach to automation of the user interface, and uniquely built on Java, our solution performs well in situations where other tools may fail. As a result of its open and carefully designed architecture, it is simple to adopt, integrate and customize.

Our Robots, as they sit at the GUI level, and operate the system as a user would, are bound only by the same security restrictions and work-flows as a human being. This means that there is no middle layer hacking or API coding to bypass user controls, ensuring an audited and secure business transaction is completed.
**NHS - Case Study**

**Financial Automation for the Health Industry**

To automate the rostering process, which is a resource hungry, time-consuming workflow. Data from different formats is entered into the roster system, and orders are created for supplier payment.

**Virtual Workforce**

The solution was designed to automate an end to end process, with key stage deliverables including sign-off, at the UI desktop level with NO API, or application code development. The project included:

- Data extraction from Oracle web front-end into MS Excel
- Data entry into Roster system from MS Excel
- Order record creation & PO number capture for validation
- Service invoices paid

**Why T-Plan?**

- GUI level automation means no API interaction
- Tool easy to use as limited on-site programming expertise
- Centralised control over the automated process
- Management control of scheduled tasks
- Flexible deployment approach across virtual and real environments, in protected network locations

**Results**

- Time reduced automating manual tasks
- Improved accuracy. Manual process had only 60% success; now 100%
- Delivered end to end change program across key business functions
- Staff resource freed up for other processes
- Implementation by the business to live only 2 months
- Now running for 8 departments at a massive cost saving

QUOTE... “Our virtual robots have saved time, effort, money & resource.”

[RPA Project Manager]

6 hour Process now takes 10 minutes
Co-op Energy - Case Study

Customer Account Automation for the Energy Industry

Following the purchase of Flow Energy, Co-op Energy required the migration of account records from one system to another.

Project Scope

Faced with a manual copy & paste activity of over 230,000 customer account records, from the legacy to the new accounts system, an automated robotic process solution was required. Leveraging T-Plan’s expertise with the ‘test automation’ team we were asked to implement the solution.

The realisation of this process was reached just 20 minutes after our arrival at the corporate offices; after over 3 weeks of failed effort by UiPath.

Virtual Workforce

The solution was designed to automate an end to end process, migrating data from the legacy system to the new system. The project critically involved the reading of PDFs to obtain important account information; with NO API, or application code development allowed. The project included:

- Search, Find and Open customer ledger in Gentrack software
- Open attached PDF & retrieve customer supply number using OCR
- Match customer supply record in other system & copy relevant data from source system to new system.

Results

- Time reduced automating manual work
- Improved accuracy. Manual process had only 75% success; now 100%
- Delivered end to end change program across key business functions
- Staff resource freed up for other processes
- Implementation by the business to live in only 3 months

Why T-Plan?

- GUI level automation means NO API code development
- Tool easy to use as limited on-site programming expertise
- Centralised control over the automated process
- Management control of scheduled tasks
- Flexible deployment approach across virtual and real environments, in protected network locations

QUOTE...

“Account migration now happens in minutes rather than hours!”

[RPA Project Manager]
**Account Automation for the Telco Industry**

Each time external call centre agents are hired to handle sudden peaks in workload, a complete set of accounts in all the systems has to be created.

**Project Scope**

As an external workforce is hired with very little advance warning, it is crucial to set up their accounts quickly, so they can start working right away.

Since these resources are only working for short periods of time, these accounts have to also be disabled quite frequently. This process led to hundreds of account transactions per week needing to be actioned manually.

**Virtual Workforce**

In order to be able to create, update and disable huge numbers of accounts in multiple applications, the client set up a robot automated process to handle all of these changes. The robot picks up the work item in a centralized account management system, and executes all necessary actions over multiple systems, in a timely and quality controlled way.

This allowed the resource reassignment of these error prone and stressful tasks, so that they can work on more gratifying and intellectually challenging activities.

Instead of taking up to 15 minutes of human work time per account, this work is now handled by our robots within 30 seconds.

**Solution**

Robotic automation of the creation, update & disabling of accounts, across multiple applications.

**Why T-Plan?**

- GUI level automation meant creation of processes was ‘Business-led’
- Automation mimics a human user, thus conforming to all security & audit controls already in place
- Solution is easy to use, as limited on-site IT development expertise
- Centralised control over the automated process
- Same automation scripts used across all environments
- Management control of scheduled tasks

**Results**

- Quick implementation of solution with business buy in
- Time reduced automating manual tasks
- Staff resource freed up for other processes
- 8 hour work queues now only take 16 minutes

**Quote... “Account Maintenance Only Takes Minutes Now!”**

[RPA Project Manager]
Robot Automation PORTAL

- Central management hub for all RPA activities
- Statistical analysis of corporate wide processes
- Management control of resource workload
- Clear visual success/failure indicators
- Simple process playback controls
- Web dashboard for remote WAN/LAN access

Robot Automation DRIVER

- Core engine for automated processes
- Process relationship management
- Process design and authoring (inc. Record & Playback)
- Cross-platform delivery
- RAD relationships allow scalable deliveries
- Process correction and low level reporting

Robot Automation SYSTEM

- Use of native end user systems
- Support of both legacy frameworks and latest technology
- No code injection required
- Multi-platform support covering Desktop, Mobile and Tablet
- Physical and virtual hardware supported providing scalability yet controlling project costs
- Reproduce real user actions accurately, consistently, repetitively

RPA ANYthing, ANYwhere