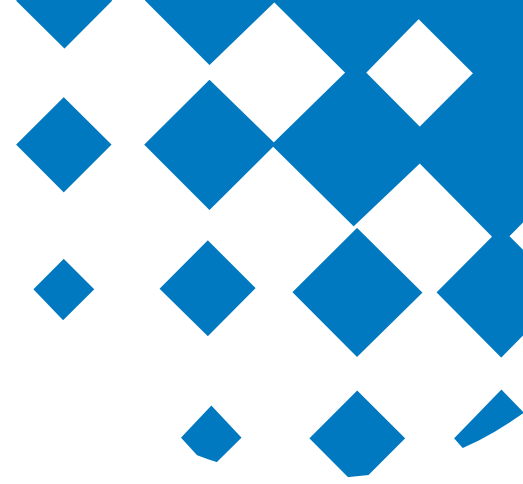


Creating a Digital Workforce with Robotic Process Automation

Anthony Yung, Senior Systems Engineer



Big relevant change in the world: the digital revolution



☰ BUSINESS INSIDER TECH INSIDER

THE INTERNET OF THINGS 2017 REPORT: How the IoT is improving lives to transform the world

☰ Forbes 🔍 LOG IN

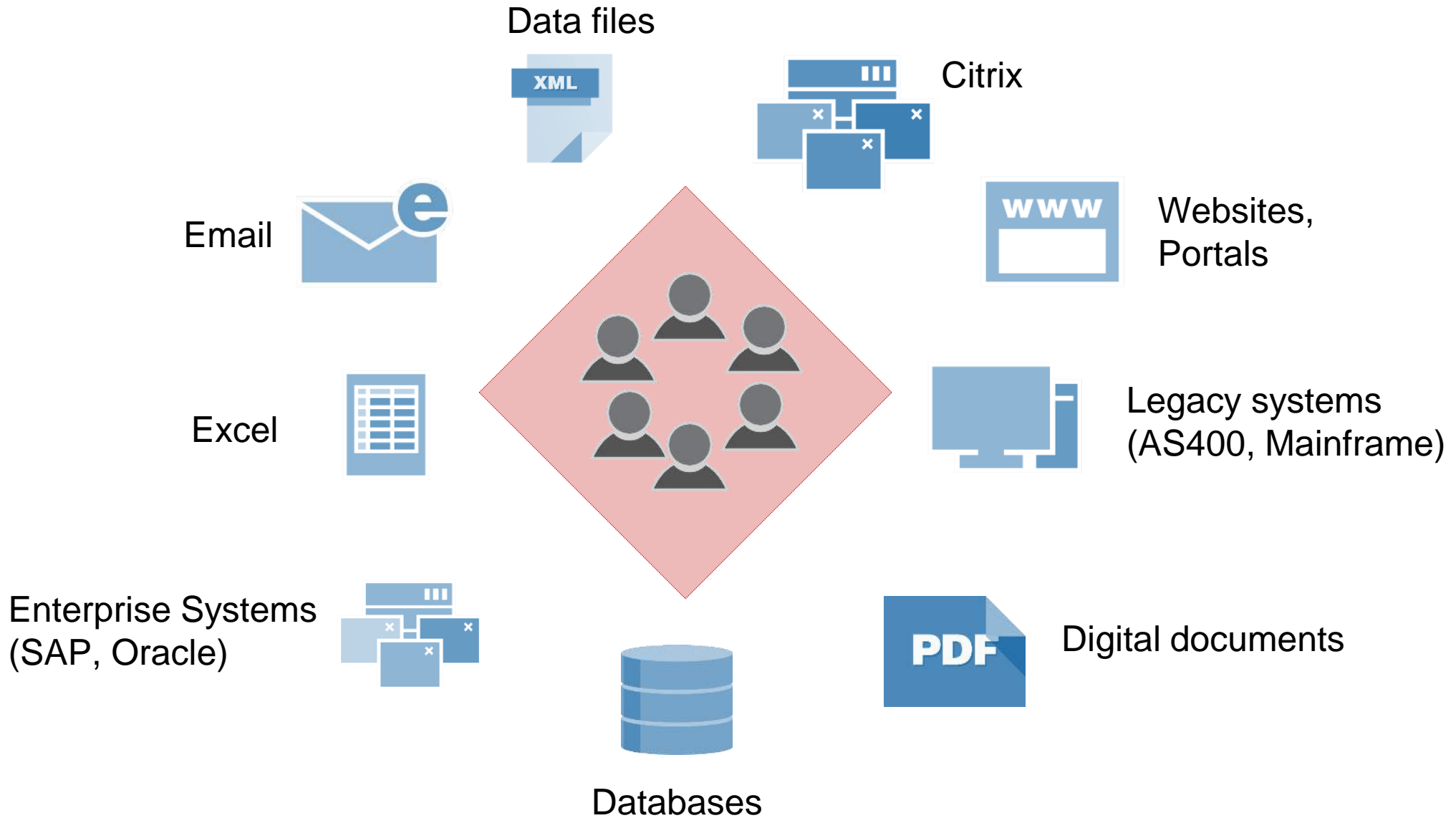
YOUR READING LIST

Artificial Intelligence Will Make Its Mark Within Next 3 Years

BloombergBusinessweek

Uber's First Self-Driving Fleet Arrives in Pittsburgh This Month

Digital revolution set to impact the office worker

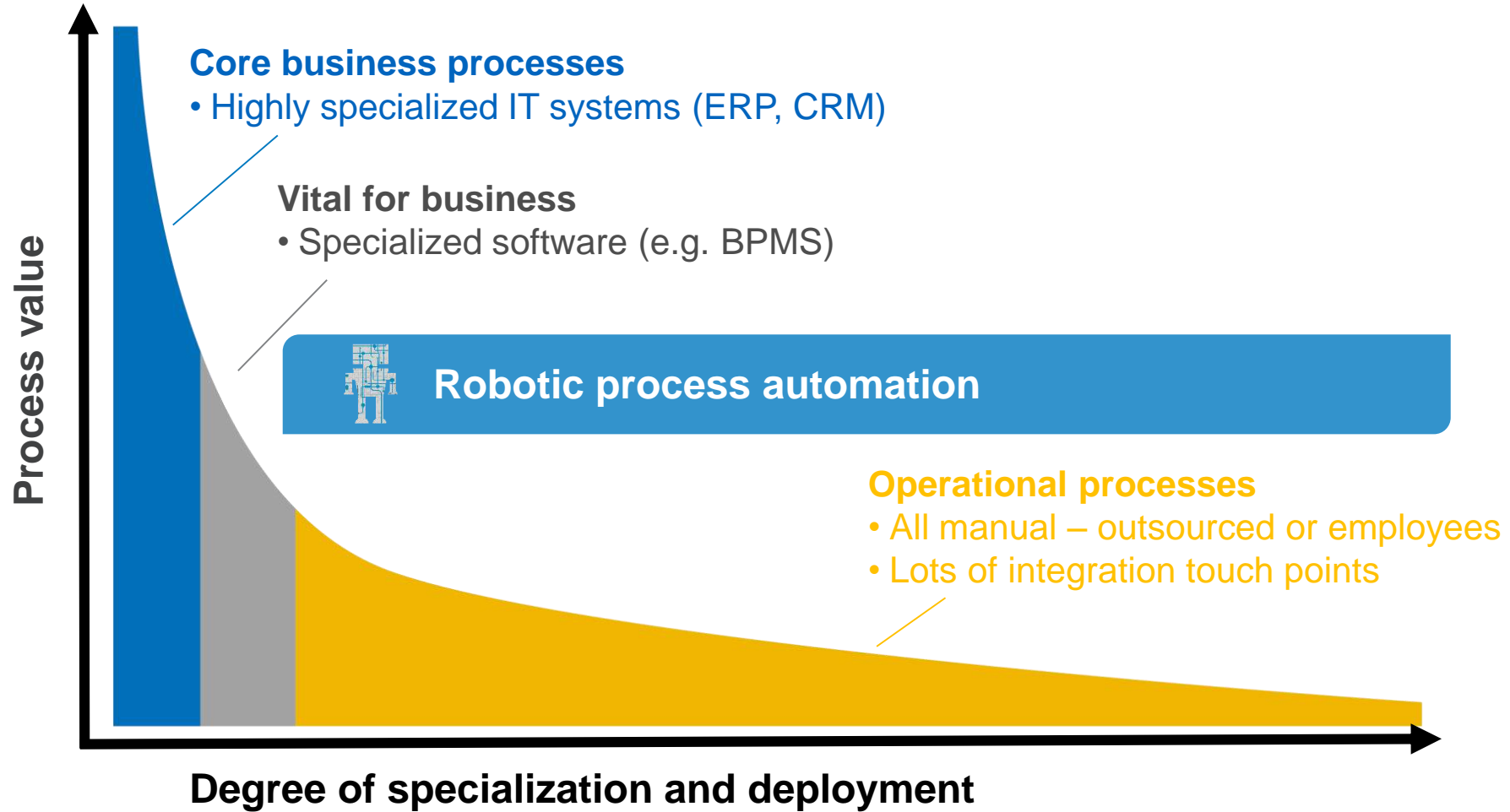


New digital workforce - robotic process automation

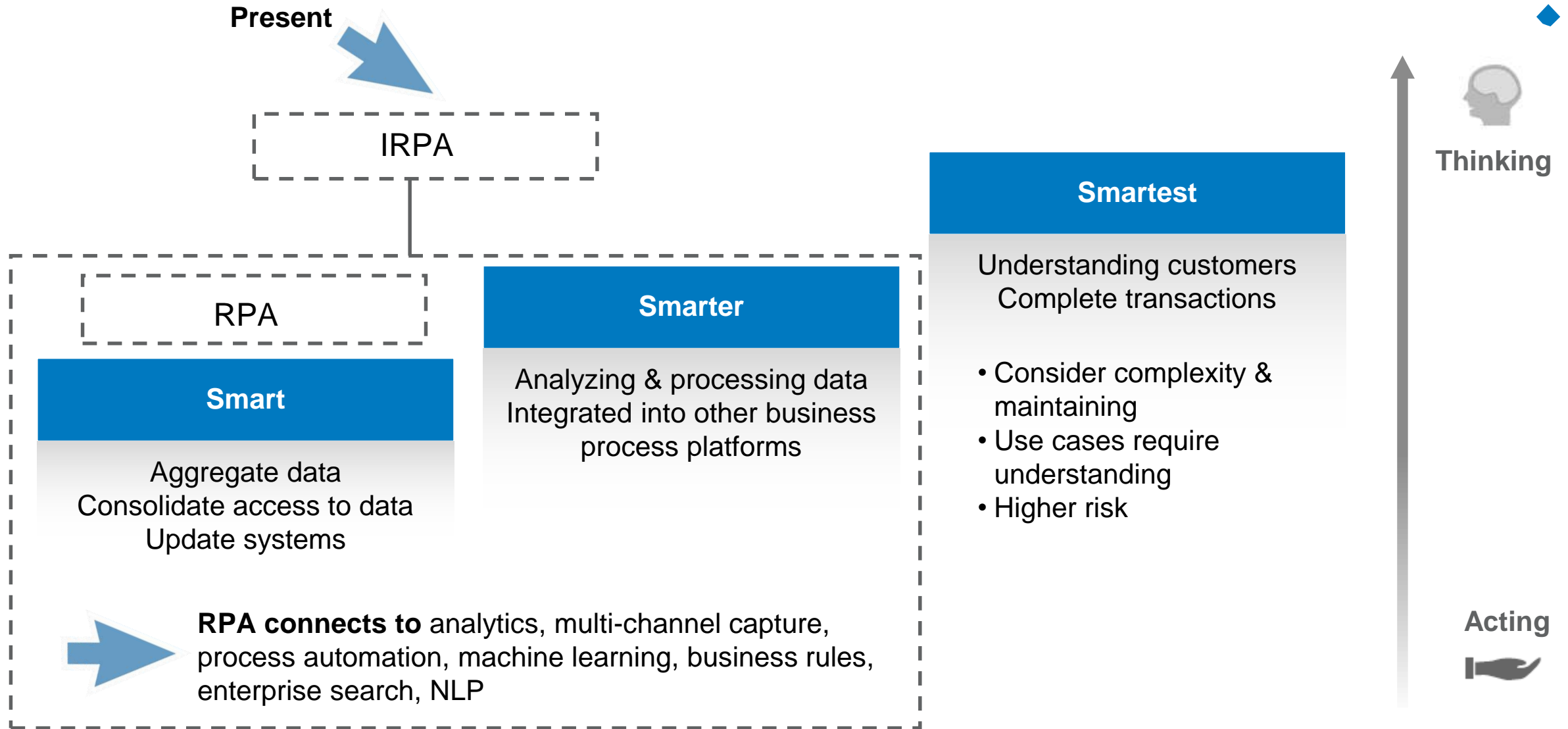


“*Robotic process automation (RPA) is the application of technology that **automates workflow processes**, primarily for administrative work. RPA software can help automate **large volumes** of digital manual-processing work.”*

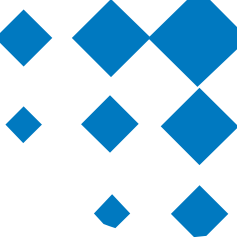
The long-tail of automation use cases



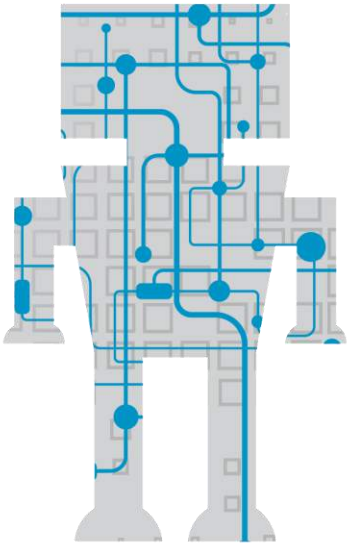
Progression of the Digital Workforce



The Kofax Kapow solution

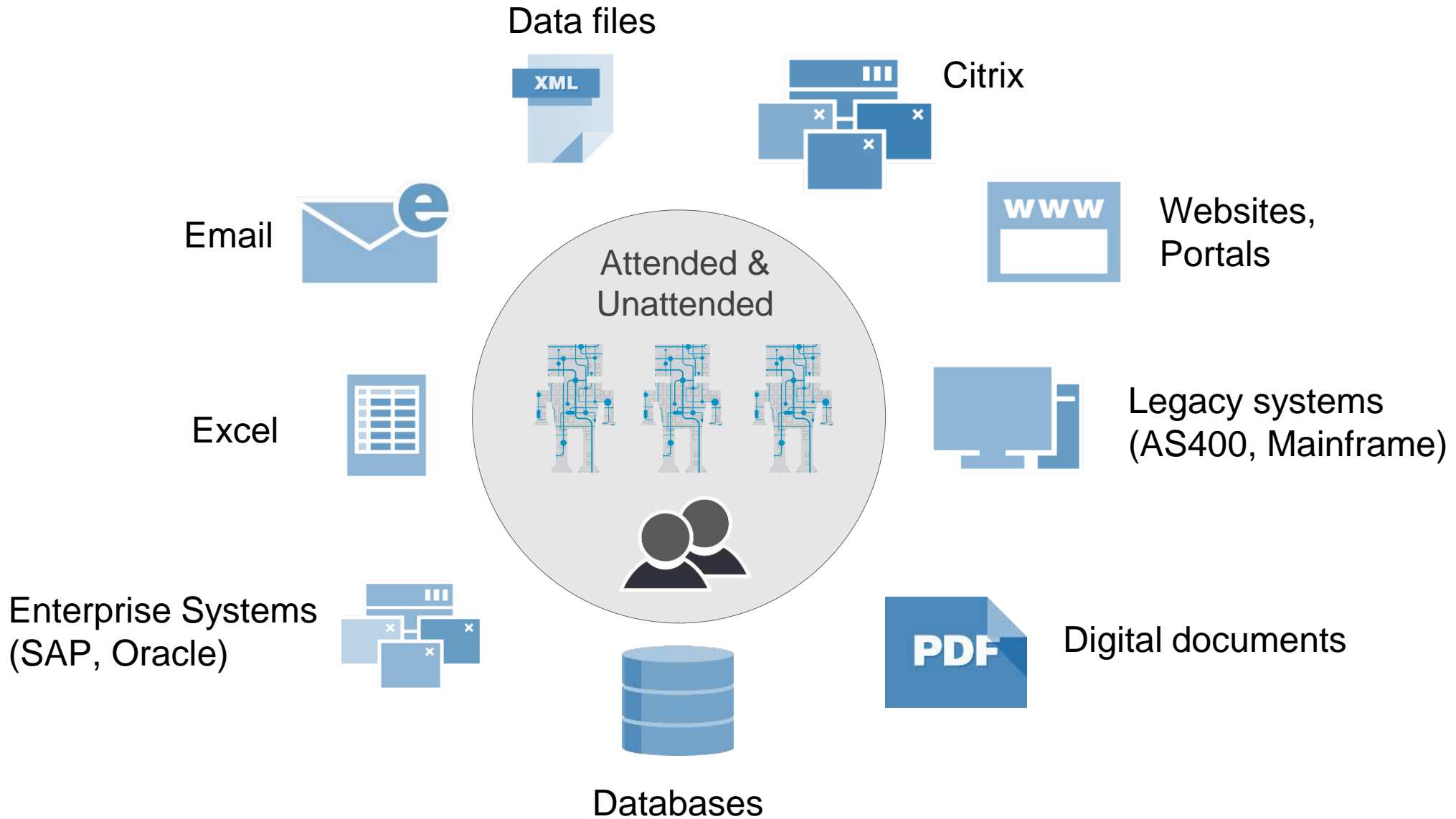
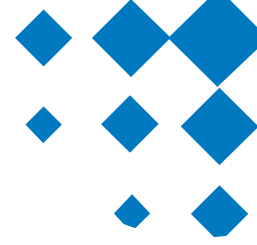


Automate any business activity involving users, data & systems



- ✓ Automate the acquisition and integration of information
- ✓ Create a single view of multiple data sources
- ✓ Automate processes by replicating actions of a user
- ✓ Transform data into valuable information

The new digital workforce: software robots performing manual tasks



The benefits of robotic process automation

Kapow Benefits

- Consistency
- Reliability
- Accuracy
- Audit trail
- Productivity
- Cost savings
- Elasticity



25-50% cost savings



One robot can do the work of several FTEs



Increases staff productivity, service levels and capacity by **35-50%**



Delivers consistent **100%** accurate data



Better employee satisfaction

How RPA is being leveraged



Web Robots: Data Collection


Process Robots - Automate Manual Business Process Activities

 **Banking**


- Equity research
- Compliance and risk management

 **Information & Services Provider**


- Data aggregation
- Screening and risk management services

 **Retail, Travel**

- Competitive intelligence and price monitoring
- Brand monitoring and fraud protection


 **Banking**

- Mortgage lending
- Compliance reporting
- Customer service
- Client onboarding (KYC/CDD)


 **Cross-Industry**

- Finance and accounting
- Sales operations

 **Shared Services Groups, Business Process Outsourcing (BPO)**

 **Logistics**


- Order scheduling and tracking
- Invoicing and credit collections
- Researching loads

 **Healthcare**

- Patient eligibility
- Physician credentialing
- Customer service

 **Manufacturing**

- Supply chain automation
- Inventory Tracking and Processing
- Pricing & Procurement

 **Insurance**

- Claims processing
- Compliance reporting
- Customer service

Kapow intelligent bots part of a broader solution offering



Insurance



Financial services



Government



Healthcare



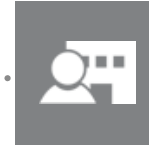
Retail



Manufacturing



Education





Business process outsourcing



Multichannel capture

Extraction & verification



Capture information



Case management

Workflow & process automation



Automate processes



Content management

Search

Manage content



Customer communication management

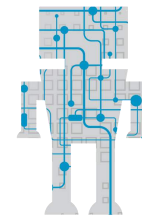
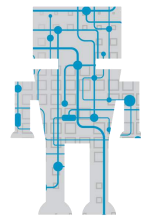
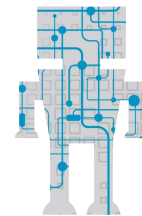
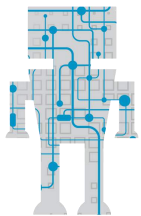
eSignature & signature verification

Transact digitally

Mobile

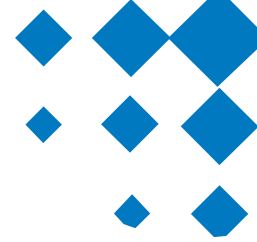
Analytics

Robotics



Banking Use Case: Customer Due Diligence

Story: Customer Due Diligence process



The screenshot shows a web browser window with the following elements:

- Browser Address Bar:** `http://localhost/TotalAgility/Forms/CDD/LandingForm_Business.form?RETURNCONTRI`
- Browser Tabs:** Business Home Page
- Browser Bookmarks:** KTA Designer, KTA Workspace, Kofax CCM, Kapow Console, CDD Demo - Logon
- Page Header:** Customer Due Diligence Robotic Process Automation Platform
- Page Title:** Customer Due Diligence Automation Platform
- Text:** Please select from the options below
- Buttons:**
 - New Customer (with a plus icon)
 - Update Existing Customer (with a pencil icon)
 - Manage Recertification (with a list icon)
 - Go to Task List (a button below the other three)

New Customer – Review Results



Customer Due Diligence
Robotic Process Automation Platform

CDD View Process

Review Results CDD_103512190

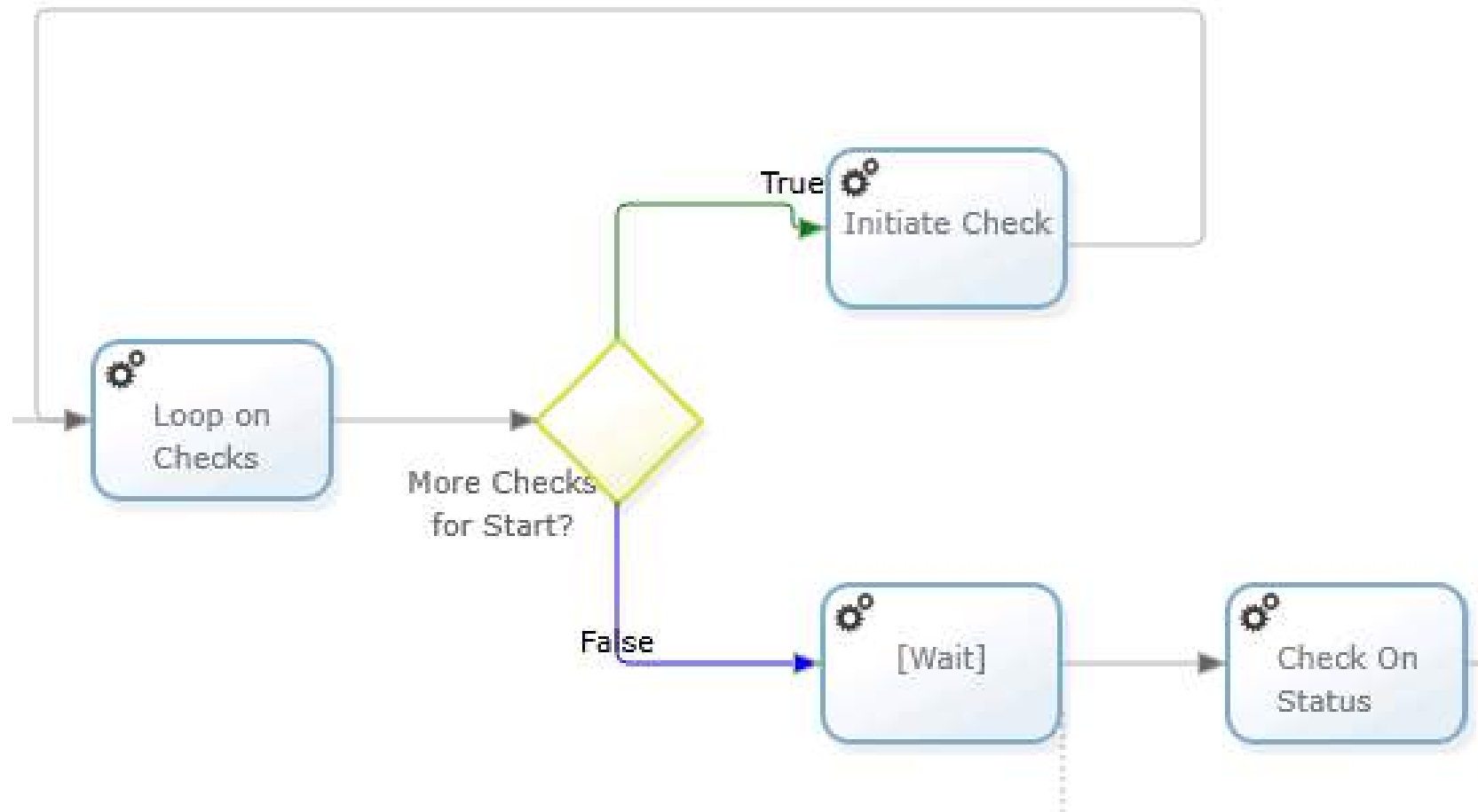
Customer Name : **Mary Smith** Onboarding Date : **3/9/2017**
Address : **100 Main Street**
City : Country :

Results

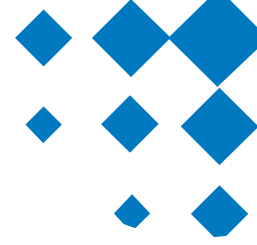
| RESU... | VERIFICATION | RECOMMENDATIO... | REQUEST TIME | RESPONSE TI... | SCORE |
|---------|------------------------------|------------------|----------------|----------------|-------|
| ✓ | UN GLOBAL SANCTIONS LOOKUP | PASS | 3/9/2017 10... | 3/9/2017 10... | 0 |
| ✓ | INTERPOL MOST WANTED LOOKU | PASS | 3/9/2017 10... | 3/9/2017 10... | 0 |
| ✓ | UK POLITICALLY EXPOSED PERSI | PASS | 3/9/2017 10... | 3/9/2017 10... | 0 |
| ✗ | GOOGLE BAD PRESS SEARCH | FAIL | 3/9/2017 10... | 3/9/2017 10... | 100 |
| ✓ | CUSTOMER REFERENCE DATA LOI | PASS | 3/9/2017 10... | 3/9/2017 10... | 0 |

[View Results](#)

How it works behind the scenes



Kapow Design Studio – no coding approach



The screenshot displays the Kapow Design Studio interface. At the top, a workflow design is visible with steps like 'Load Page', 'Enter Text', 'Enter Password', 'Click Login', 'Find TextField', 'Test Tag', 'Click Submit', 'Click Transactions', 'Click Enter Bills', 'Enter Text', and 'Save Session'. Below the workflow is an integrated browser window showing the 'New Bill' form in the NetSuite application. The browser window includes a navigation menu with options like 'Home', 'Activities', 'Transactions', 'Lists', 'Reports', 'Documents', 'Setup', 'Customization', 'Support', 'Sales', and 'Knowledge'. The form fields include 'Vendor', 'Date', 'Posting Period', 'Reference No.', 'Amount', 'Terms', 'Due Date', 'Currency', and 'Exchange Rate'. At the bottom of the interface, there is a 'Variables' panel showing an 'Invoice' variable with fields for 'internal_id', 'order_no', 'amount', 'vendor', and 'line_items'. The interface also includes a 'Databases' panel on the left and a 'Ready' status bar at the bottom.

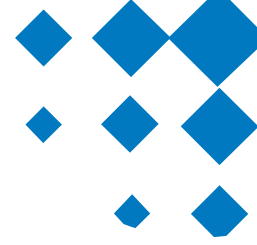
Workflow Design

Integrated Browser

Real-time Development & Testing

Full XML / HTML Control

Deploy, manage, and schedule bots



Kapow Catalyst Management Console
Version 9.4.0 trunk
nightly 1494

Server Time: 21:21 | Local Time: 21:22

Dashboard | **Kaplets** | Schedules | Repository | Data | Logs | Admin

Repository > Robots

+ Add Robot | Filter | Project All

Robots per page 40 | Refresh Every minute

| Name | Project Name | Version | Size | Schedules | Delete | Input Types | Returned Types | Stored Types | Snippets used | Last Modified | Run Now | API | REST | SOAP | Down |
|-------------------------|--------------|---------|-----------|-----------------------------|--------|------------------------------|-------------------------|------------------------------|--------------------|---------------------|---------|-----|------|------|------|
| facebookapi2 | Social Media | 9.4.0 | 11.75 KB | | | [OAuthCredentials] | [friends] | | | 2014-07-02 12:50:45 | | | | | |
| exce_addrow | Monitors | 9.4.0 | 54.41 KB | | | [ExcelFile] | [ExcelFile, share] | | [Google_Financ... | 2014-07-02 12:50:44 | | | | | |
| exce_addcolumn | Monitors | 9.4.0 | 58.49 KB | | | | [share] | | [Google_Financ... | 2014-07-02 12:50:44 | | | | | |
| TwitterLocationSearch93 | Social Media | 9.4.0 | 112.47 KB | | | [OAuthCredentials, twitt...] | [TweetChart, Tweetitem] | | [TwitterOAuth_1] | 2014-07-02 12:50:45 | | | | | |
| StaplesMonitor | Monitors | 9.4.0 | 77.12 KB | [AcerSchedule, AsusSche...] | | [CollectBrand] | | [MonitorProduct, Produc...] | [TwitterOAuth_1] | 2014-07-02 12:55:19 | | | | | |
| Lookup_people_from_co94 | Social Media | 9.4.0 | 44.83 KB | | | [CompanyName, OAuth...] | [Connection] | | [LinkedInOAuth] | 2014-07-02 12:50:45 | | | | | |
| Get_EDGAR_Reportings | EDGAR | 9.3.2 | 140.09 KB | [EDGARSchedule] | | | | [FiledTransaction, Liste...] | | 2014-07-02 14:17:33 | | | | | |
| GetPriceChanges | Monitors | 9.3.2 | 6.09 KB | | | | [PriceChangeReport] | | [FindPriceChange] | 2014-07-02 12:55:43 | | | | | |
| CDWMonitor | Monitors | 9.4.0 | 86.38 KB | [AcerSchedule, AsusSche...] | | [CollectBrand] | | [ModelPartMap, Monitor...] | [CheckProductPr... | 2014-07-02 12:55:30 | | | | | |
| BloombergEnrich | EDGAR | 9.4.0 | 105.36 KB | [EDGARSchedule] | | | | [BusinessWeekInfo] | | 2014-07-02 15:25:47 | | | | | |
| BestBuyMonitor | Monitors | 9.4.0 | 167.80 KB | [AcerSchedule, AsusSche...] | | [CollectBrand] | | [MonitorProduct, Produc...] | [CheckProductPr... | 2014-07-02 12:56:04 | | | | | |
| AmazonMonitor | Monitors | 9.4.0 | 96.42 KB | [AcerSchedule, AsusSche...] | | [CollectBrand] | | [MonitorProduct, Produc...] | [CheckProductPr... | 2014-07-02 12:56:13 | | | | | |

Page 1 of 1 | Displaying 1 - 12 of 12

Monitor and analyze the performance of bots



KOFAX Analytics for Kapow powered by Citrix | Welcome Studio Administrator | Today is 03/03/2015

Overview Clusters Projects **Schedules** | Bookmarks | Logout

Time period: Current day | Reset Filters

Schedules | **Details** | Robots

Project: Default project

- Bicycles_With_L
- Dik to Rmb sch
- Facebook_Gro
- GetSSD
- Monitors
- popular webst
- Schedule
- ScheduleConv
- ScheduleTravel
- ScheduleWithk
- Schedule_JSOP
- search engines
- ShockPrices
- Tada
- Tweeter

Robot MU/simon/robot/ShockPrices

Execution time

Errors

Extracted records

| Time | Roboserver | Wait time | Queue time | Execution time | KCU | Errors | Records |
|---------------------|--------------------|-----------|------------|----------------|------------|--------|---------|
| 03/03/2015 00:33:22 | 172.17.20.52:50002 | 00:01:05 | 00:00:00 | 00:03:19 | 562,534.00 | 0 | 11 |
| 03/03/2015 01:34:00 | 172.17.20.52:50002 | 00:00:52 | 00:00:00 | 00:03:57 | 562,540.00 | 0 | 11 |
| 03/03/2015 02:33:31 | 172.17.20.52:50002 | 00:00:48 | 00:00:00 | 00:03:22 | 562,530.00 | 0 | 11 |
| 03/03/2015 03:34:12 | 172.17.20.52:50002 | 00:01:39 | 00:00:00 | 00:04:10 | 562,536.00 | 0 | 11 |

Export to Excel **Wrap** | Filter Active | Reset | Total amount: 4



Now its time for the demo



KOFAX 

The word "KOFAX" is written in a bold, black, sans-serif font. To the right of the text is a circular logo icon composed of a grid of small squares in alternating blue and white colors, creating a checkered or pixelated effect.