Process Robotics

Department of the Navy Financial Management Applications
Agenda
Topics of Discussion

• Overview: What is Process Robotics?

• Benefits of Process Robotics: Why Should the Department of the Navy (DoN) Use Process Robotics?

• BUPERS Use Cases for Process Robotics: Processes Identified for Automation

• Application of Process Robotics at Your BSO: Applicability to Financial Management

• Process Robotics Approval & Implementation: How Can You Acquire Robotics Software?
Overview

What is Process Robotics?

**Software 'robots' perform routine business processes** by mimicking the way people interact with applications through a user interface and following simple rules to make decisions.

- **Programmed to perform repeatable tasks:**
  Software Robots are programmed to replicate repetitive human tasks using recorders and easy programming language.

- **Replicate Human Interactions:**
  Robots mimic common tasks such as queries, cut & paste, merging, mouse button clicks, etc., faster and with less error than a human can manually perform the task.

- **Implemented at the desktop or in the virtual environment:**
  Robots provide the flexibility to quickly deploy robots directly onto existing desktops (Attended Robot) or, in the future, virtually (Unattended Robot).
Benefits

Why Should the DoN Use Process Robotics?

Process Robotics has potential to disrupt our approach to accomplishing financial management tasks, allowing us to work faster, with more accuracy, freeing up analyst time for more impactful tasks and financial analysis.

**Freed Hours:**
Robots can be utilized to perform repetitive tasks, allowing analyst time to be freed up for the performance of value-added tasks such as financial analysis.

**Flexibility & Multitasking:**
With Process Robotics software, analysts have the flexibility to quickly deploy robots, allowing personnel to focus on other tasks while the robots execute.

**Accuracy & Risk Mitigation:**
Robots can perform tasks such as data entry, utilizing copy & paste functionality to ensure accuracy of inputs, and reducing human error and mitigating risks. Improves quality – out of every 100 process steps, humans are likely to make 10 errors – robots perform consistently, accurately, and tirelessly.
## Use Cases

*BUPERS Processes Identified for Automation*

BUPERS documented use cases for process robotics where repetitive, highly-manual, and error-prone tasks could be automated to save Analyst time, Navy dollars, and reduce manual error.

<table>
<thead>
<tr>
<th>MILPAY Audit Response</th>
<th>Travel Order Processing</th>
<th>Travel Voucher in TRIM</th>
<th>Intake of Travel Claims</th>
<th>Transcript Processing</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Use Case</strong></td>
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<td>Robot reads listing of sampled entitlements, accesses online MILPAY document repositories, downloads key supporting documentation (KSDs), saves the documentation with unique naming convention.</td>
<td>Robot pulls order data and costs from an email box and travel websites, compiles report for Analyst review, and enters required order data into POEMS online system.</td>
<td>Robot will automate saving of key supporting documents (KSDs) from Transaction Online Processing System (TOPS) into the Navy’s records information management system (TRIM).</td>
<td>Robot will automate the intake portion of the travel claim processing function – including the intake, upload, and transfer of blocks and travel claims in TRIM.</td>
<td>Robot will automate and expedite the process of manually entering specific data fields from high school and college transcripts information into the Officer Personnel Information System (OPINS).</td>
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<td><strong>Expected Impact</strong></td>
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<td>Improves audit response time during external/internal audits and reduces number of FTEs used to pull docs. Robot frees up FIAR analyst time to perform sample review.</td>
<td>Reduces process level of effort for MILPCS Analysts, reducing manual data entry and flagging any areas requiring Analyst attention.</td>
<td>Anticipated to reduce process level of effort by 3,200 hours annually, through faster processing time and reduction in data lag.</td>
<td>Anticipated to reduce process level of effort by 2,100+ hours annually, through faster upload and transfer of claims to TRIM.</td>
<td>Reduces process by 400+ hours annually, through faster processing time per transcript record uploaded to OPINS.</td>
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<td><strong>Current Status</strong></td>
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<td>Robot currently in use for IPIA Sample response</td>
<td>Documenting current process, preparing for development</td>
<td>Robot in development</td>
<td>Robot in development</td>
<td>Documenting Processes and obtaining system access</td>
</tr>
</tbody>
</table>

**Legend:**
- Exploring Robot Development
- Implementing Pilot Robot
- Robot in Use
Future Applications

Applicability to Financial Management

**Process Robotics can be utilized to automate many of the repetitive rules-based tasks that typically comprise Financial Management.** Tasks such as pulling source documents can be completed effectively by software robots, freeing up analyst time for more meaningful financial analysis.

**WHERE CAN PROCESS ROBOTICS HELP BSOs?**

- Opening emails and attachments and consolidating information for data entry
- Auto-generating emails to users
- Moving files and folders
- Populating forms
- Reading and writing information to databases
- Logging into web/enterprise applications to upload or download documentation
- Gathering data from websites and online repositories
- Making calculations
- Extracting structured data from documents
UiPath Studio: Process Automation

N10 Actions to Date:

**NMCI Approval**
- Completed paper work for UiPath software for NMCI testing and registered the UiPath software in DADMS for all NMCI laptops.

**ITPR Approval**
- Obtained Information Technology Procurement Request (ITPR) from OPNAV N1.

**Funds Approval**
- Obtained funds approval to purchase UiPath Licenses by submitting a Requestion for Equipment/Services form by department head approving officials.
- Subsequently, worked with the vendor and the clients purchase card holders.

**Software Push to NMCI Assets**
- Worked with NMCI IT support team to acquire UiPath software to NMCI machines.

**Software Cost for UiPath:**
- **UiPath Studio:** $3,000
- **UiPath Attended Robot:** $1,200

**Software Cost Incurred to Date:**
- **UiPath Studio:** $3,000 * 2 = $6,000
- **UiPath Attended Robot:** $1,200 * 2 = $2,400
- **Total Cost Incurred:** $ 8,400

Steps to obtain Official Approval For bot to go-live at BSO’s