



# Robotic Process Automation

*- The Practice*

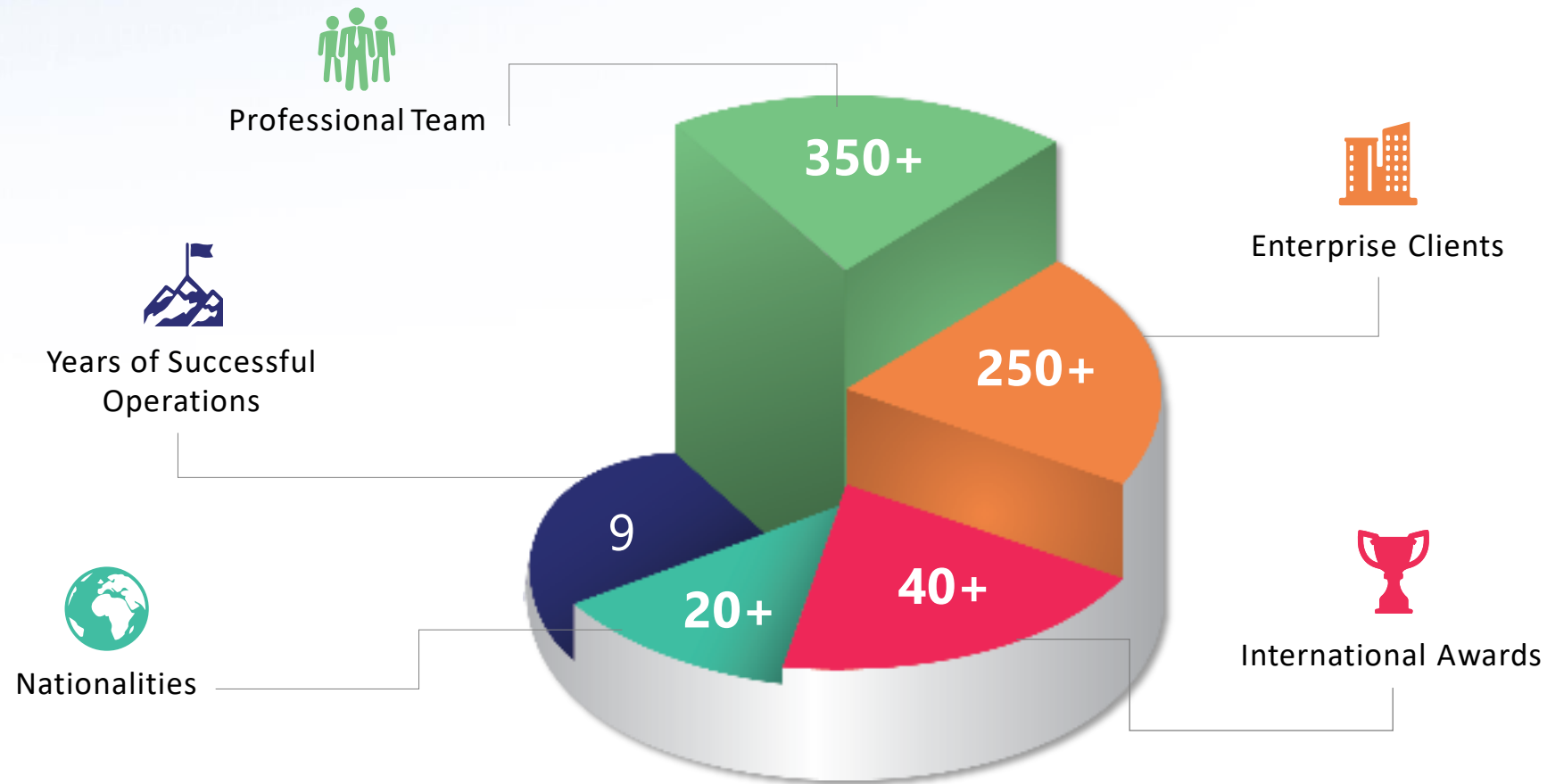


ENABLING  
DIGITAL  
TRANSFORMATION

# Quick Facts about Finesse Global

## Our Vision

We stand to build a world- class institution to positively impact the lives of people around us.



# Focus Vertical Domains

## Healthcare

IOT, Operational Excellence  
Dashboards, Cloud, Infra

## BFSI

Core Banking, Treasury, Capital Markets,  
Portfolio Mgmt, Corporate Treasury,  
Compliance, Fraud & Risk mgmt

## Education

LMS, Cloud, Infra,  
Content Management

## Hospitality

BI & Analytics, Cloud, Infra

## Infrastructure

Cloud Services, IT Monitoring,  
SDN, MDM, Infra Managed Services,  
converged Infrastructure,  
Unified Communications

## Retail

BI & Analytics, CRM, Field  
Force Automation

## Government

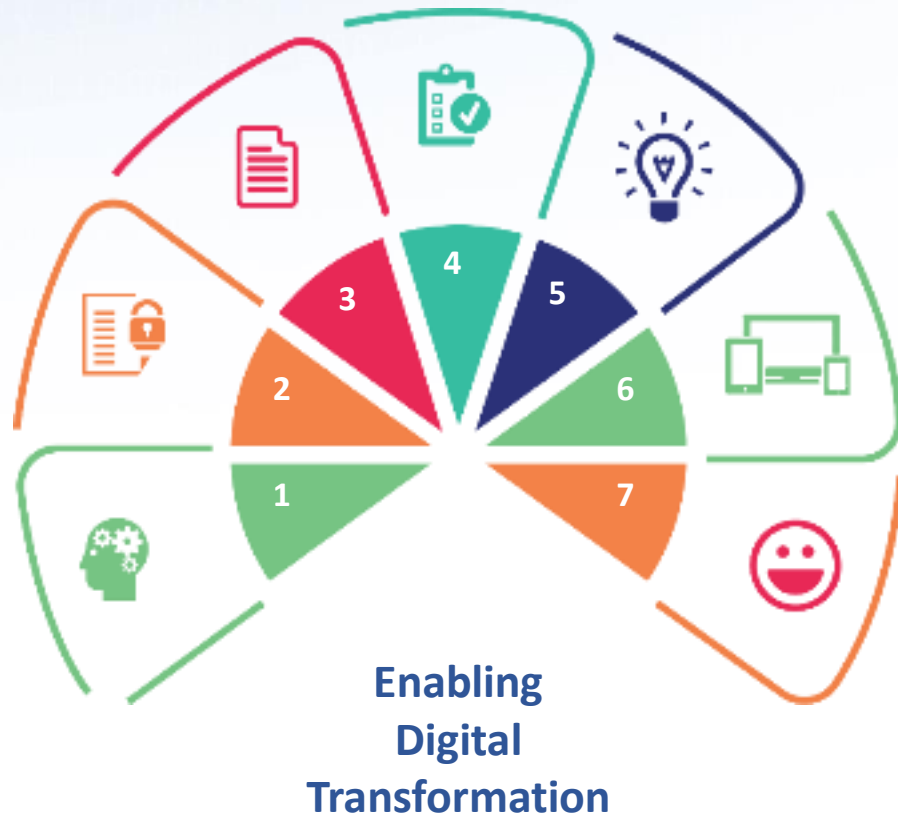
Case Management, BI, BigData & IOT

## Aviation & Transport

Operational Dashboards, Big Data  
Analytics, Field force Automation



# Focus Technology Domains



## 1. Digital Transformation

AI & Chatbots, Blockchain, Robotic Process Automation, Cloud, Big Data, IOT, Infra

## 2. Corporate Treasury Management Solutions

Kyriba – Cash Management & Forecasting, Payments/Payment Factory, Risk Management, Supply Chain Finance, Control & Compliance

## 3. Business Intelligence & Analytics

Qlik, SAP BO, OBIEE/A, IBM / Cognos / SPSS, SAS

## 4. Governance Risk & Compliance

Enterprise GRC solutions including Metric stream, Seclore, Customer XPS, Operational Risk, Internal Audit Solutions

## 5. Enterprise Content Management

OpenText, EMC / Documentum, IBM / File Net, FineDocs, Kofax

## 6. Corporate Performance Management

Budgeting planning and forecasting including collaborative disclosure mgmt, Internal and External reporting, Solutions for financial closure, reconciliation and reporting

## 7. Infra Solutions

Cloud Services, IT Monitoring, SDN, MDM, Infra Managed Services, Converged Infrastructure, Unified Communication

## 9. Customer Experience Management ( CEM & CRM )

Customer Relationship Management, Omni Channel, Loyalty



# What is Robotic Process Automation (RPA)?

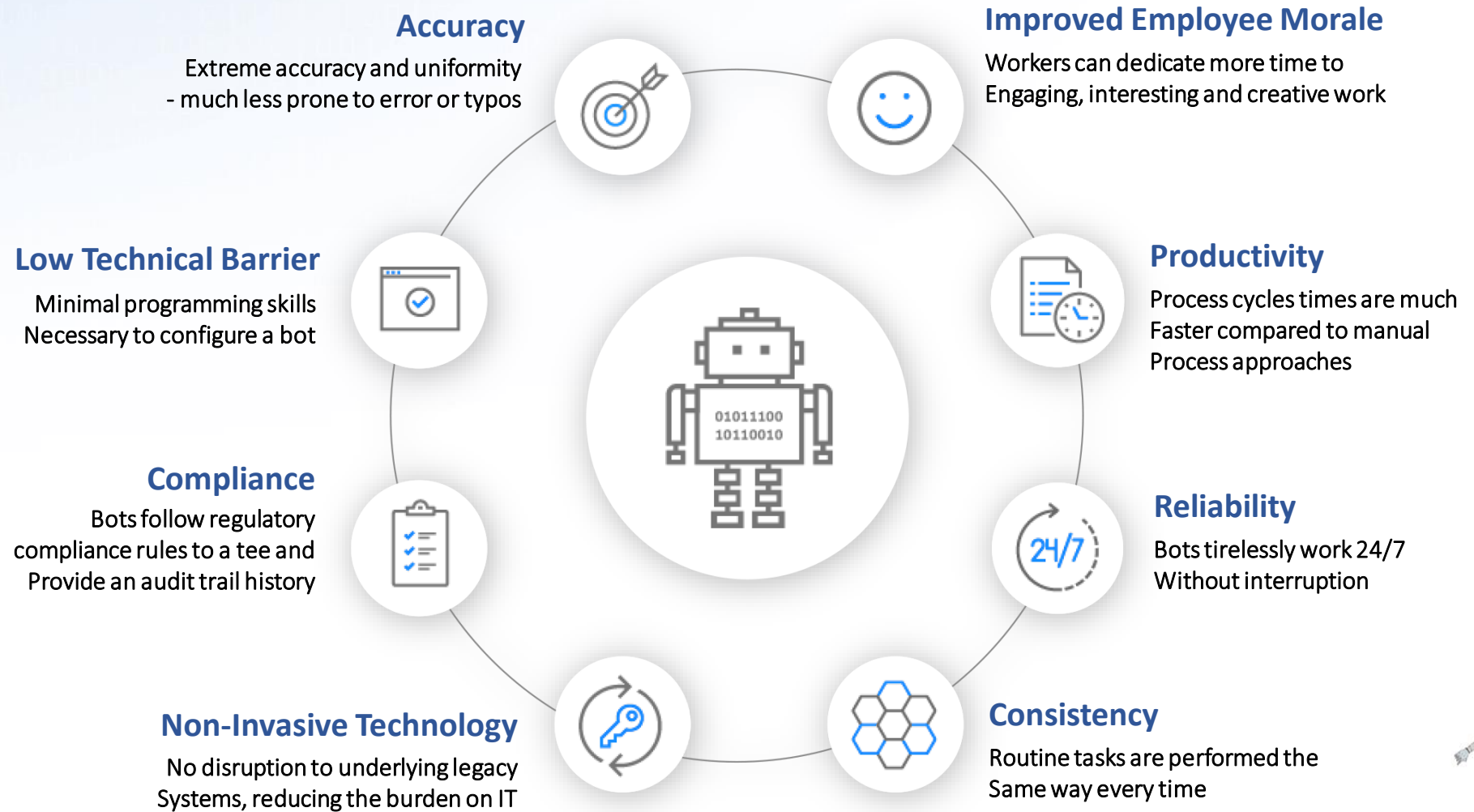
## DEFINITION:

- The use of digital software (robot) that mimic or emulate human actions to perform high-volume mundane and repetitive tasks.
- RPA can supplement and augment the human workforce and allows people to achieve more in less time.
- RPA is much more cost effective at processing large volumes or recurring tasks.
- RPA allows employees to focus on creativity, judgement and personal interaction.
- RPA will empower organizations to add outcome-based revenue models that considers value adds than traditional transactional metrics.
- Attended Bots are initiated by employees and they work together.
- Unattended Bots are Back-office Bots that execute automated tasks without any human intervention.



# Why RPA?

## THE BENEFITS:



# What Can Software Robots Do?

Here are some of the tasks that can be easily handed over to the Robots



Log in to any application



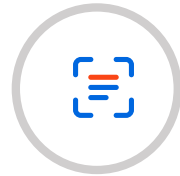
Connect to system APIs



Move files and folders



Extract content from documents, PDFs, emails and forms



Read and write to databases



Open emails and attachments



Scrape data from the web



Make calculations



# Selection Criteria

## INFLUENCING FACTORS WHILE CHOOSING PROCESSES:

### Manual and repetitive processes

Processes having higher transaction volume and frequency primarily targeted to run on a daily or hourly basis. Should have high manual effort involved to perform the same with higher potential of human errors

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### Mature Processing Instructions

Processes consisting of well defined activities controlled using complex rules specific to business.

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### Low Process Exceptions

Processes which are having minimal variations in the activities performed and associated rules leading to different handling procedure

### Electronic and Consistent Input Mechanism

The processes which makes use of standard input sources like excel, word, email, xml, csv, PDFs etc. It could also be a scanned document read using OCR. Input with unreadable data are not good candidates

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### Large Volume

Processes with high transaction volumes (and high frequency).

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### Savings - in FTEs Hours

Only target processes which are currently performed by human workers. Also there should be a savings of minimum 50% FTE hours by implementing RPA

### Processor System Change

Processes which are not prone to frequent changes or have dependency with another system which undergoes frequent changes. It also includes the target systems which is getting changed by frequent upgrades or a potential new implementation. In short the process which are expected to change in short or medium term should be avoided

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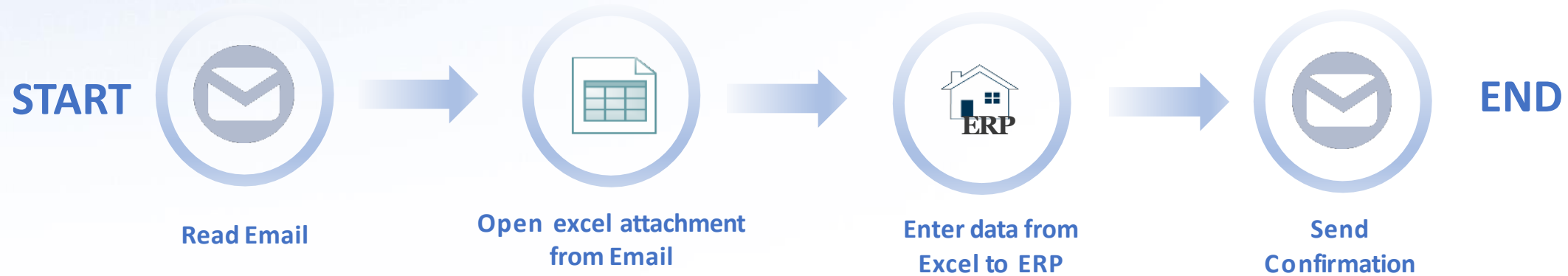
### Mature and Stable Processes

Well documented, stable and repeatable processes are the best candidates for automation.





# Sample Use Case



## OTHER ACTIVITIES THAT RPA CAN CARRY OUT:

- Extract and change data, create reports
- Perform calculations
- Fill out forms
- Run “if/then” commands
- Copy, paste and move data
- Log into and operate systems, e.g. ERP and customer relationship management systems
- Access websites
- Read and process information from multiple systems
- Process data from the Internet
- Access social media
- Open emails and process attachments
- Read information from structured documents



# Finesse Automation Expertise



## Healthcare

- Registration of Patients
- Manage Patient Records
- Insurance Eligibility Check



## HR

- Employee Onboarding
- Process of Payroll



## Telecom

- Service Order Management
- Quality Reporting



## Accounts

- Accounts Payable
- Account Receivable
- Procure 2 Pay



## Insurance

- Processing & Clearance of Claims
- Providing Premium Information



## Retail Industries

- Maintaining Bill of Materials
- Calculation of Sales

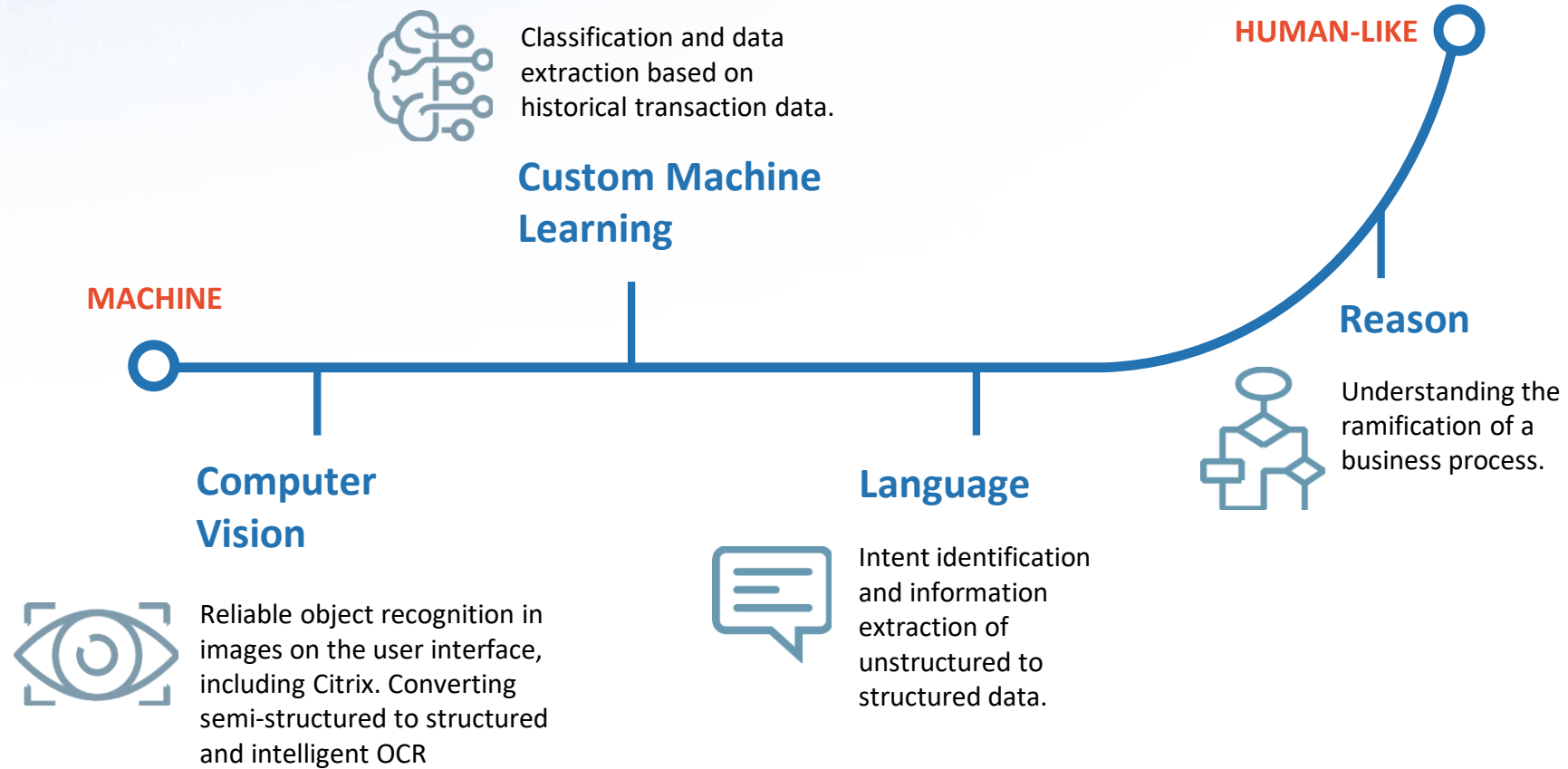


## Travel & Logistic

- Booking of Tickets
- Maintaining Passenger Details



# Unlocking the AI Opportunity



# RPA Integrated Solution Capabilities

## RPA CoE



Experienced CoE consisting of certified Architects and RPA developers

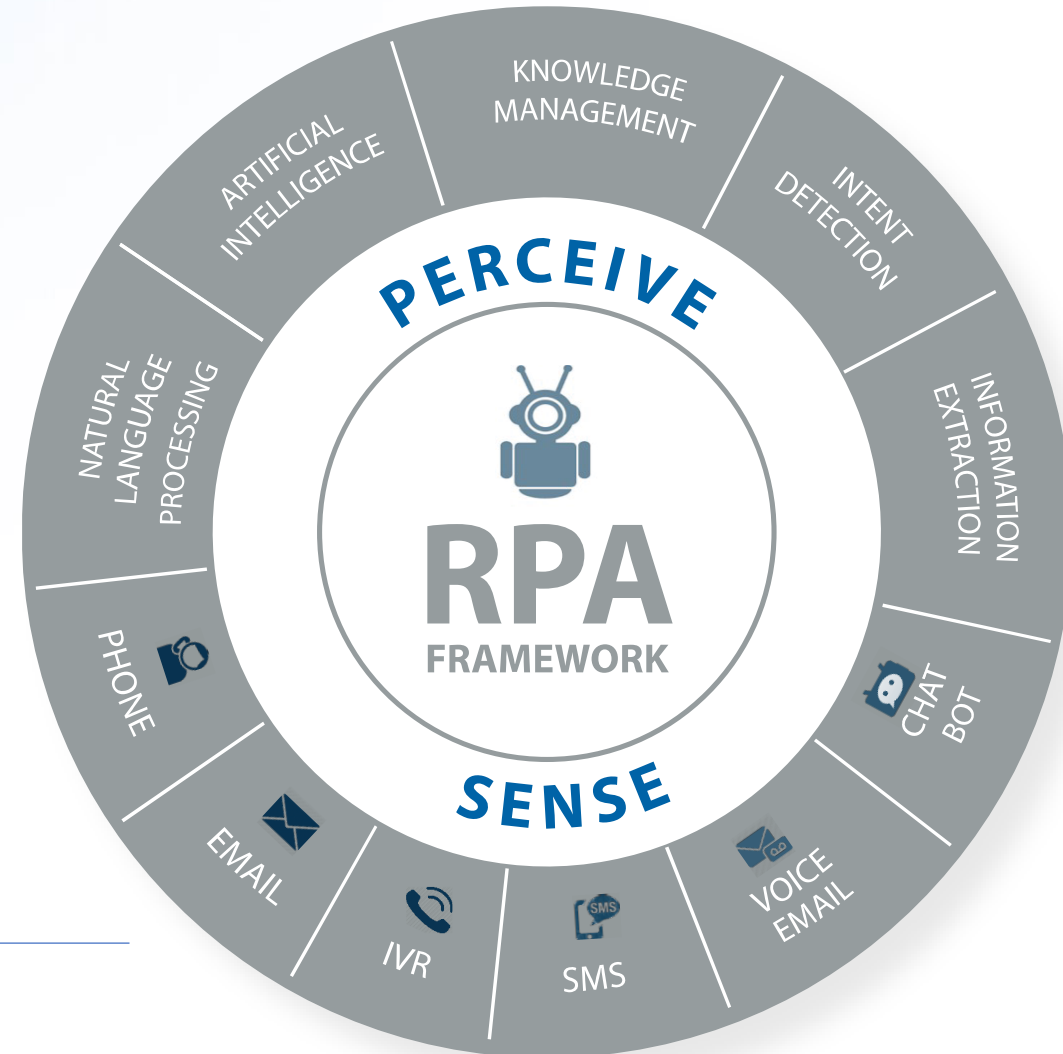


Trained & Certified in Automation and Cognitive Tools



Highly experienced in core software technologies for building custom solutions

## Partnership



# Finesse Team Structure



# Finesse RPA Engagement Models

## Option 1

### FIXED PRICED SERVICES

- Bundle Price to automate desired processes post initial process analysis
- Onshore Offshore Model
- Complete Responsibility of (Development, Testing, Deployment)
- Less involvement of Client IT
- Model most Preferred by our customers

## Option 2

### TIME AND MATERIAL SERVICES

- Price Per process.
- Onshore Offshore Model
- More expensive than fixed price
- More involvement of Client IT

## Option 3

### RPA RESOURCE OUTSOURCING

- We provide consultancy on resource model
- Rate chart can be provided on request
- Generally client use it after the first few process implementation



# Case 1

A premium healthcare network operating the top hospitals in Dubai  
Automates the **PATIENT INSURANCE ELIGIBILITY CHECK PROCESS**  
In order to enhance customer experience in terms of no waiting queues

## CHALLENGE:

The administration team has been doing the Insurance Eligibility Check manually leading to time-consuming tasks being done repeatedly resulting in the patients to wait for the whole process to be done before getting the treatment.

- Currently, the hospitals has an average of 2500 registered/existing patients visiting four of its hospitals in UAE daily.
- The data from the Emirates IDs of the patients is fetched.
- 19-20 insurance portals are scanned in order to determine the insurance eligibility of the patients.
- To eliminate the waiting time of these patients in future visits, the management wants the insurance eligibility check to be done even before they come to the hospital.



### SOLUTION:

- The digital assistant/RPA BOT is scheduled to run at midnight everyday.
- The BOT will fetch all the appointments/Emirates ID for the same day.
- Run the Emirates ID through all the applicable Insurance Provider Portals.
- On finding the eligibility, BOT captures the insurance policy details for each patient.
- Update the policy details into the healthcare management system.

### BENEFITS :

- Faster insurance eligibility checking.
- Round-the-clock performance at a lower rate.
- Eliminate manual intervention in the form of data entry.
- Better customer experience in terms of no waiting queues.
- Increase in accuracy of work.
- Improved internal processes.
- Set field-level validation.
- Better control on the data.
- Improved Patient Journey.





## Case 2

### VENDOR/CUSTOMER CREATION AUTOMATION IN SAP

for a leading retailer in UAE

#### CHALLENGE:

The Client offers the widest range of high-quality fabrics in India. Currently a new vendor/customer creation request comes from the Marketing team with specified template. The Marketing HOD approves the creation request and forwards the Business Head Approval to the SAP Support MDM Team. This entire process is very time consuming & happens on repetitive basis due to large volumes.



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#### SOLUTION:

The automation of the manual process of receiving customer/vendor creation request and creating accounts in SAP after checking for correct customer/vendor details & verifying if there are no duplications.

#### BENEFITS:

- Reducing manual intervention
- Improves Data Quality
- Saving of Time
- Improving visibility
- Improve compliance



# Case 3

## A best-in-class financial service provider automates EXTRACTION OF DATA FROM MULTIPLE SOURCES TO PRESENT CONSOLIDATED FINANCIAL STATEMENTS ON A GROUP LEVEL

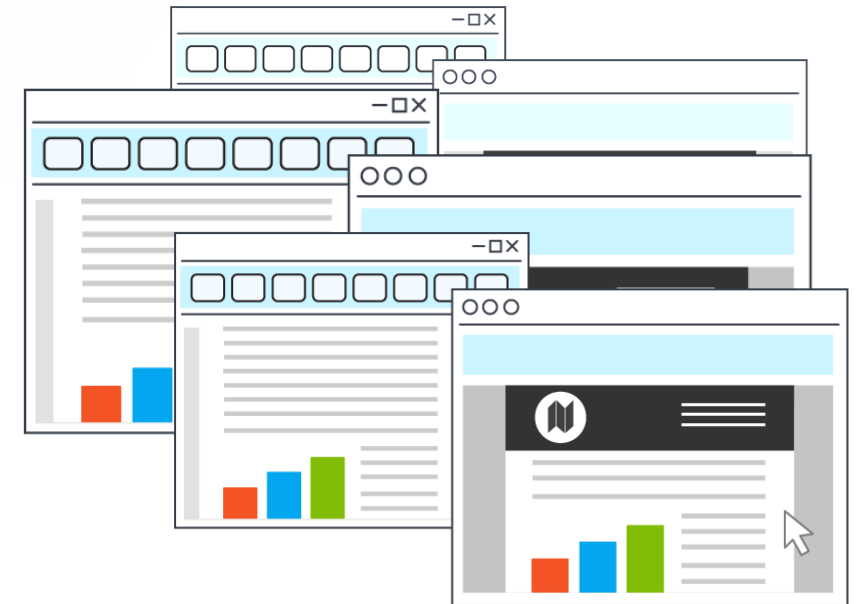
### CHALLENGE:

The finance team has been doing extraction of financial data from multiple sources to present the consolidated Financial Statements on a group level. In order to avoid the manual efforts in doing so, the management took an initiative to automate this process.

Currently,

- The team is extracting the financial statements from emails or from company websites and they are then downloading the statements into a folder.
- This data is then manually entered in a pre-defined excel template which they have prepared for reporting purpose & to have an overall performance evaluation at a group level over years.
- This sheet then helps them to do a ratio analysis and trend analysis year on year.

This exercise takes not less than 2 months for a team consisting of 2 people. The management thus decided to automate this process in order to increase accuracy & elimination of time being utilized on this process.



## SOLUTION:

- The bot will either open a specified email address or a couple of websites and download the financial statements into a specific folder.
- The bot will extract a couple of fields and insert them into a pre-defined reporting template excel file.
- The formulae specified in that excel sheet will be applied.
- The bot will extract some specific cells into a final report in an agreed format (cells will be agreed upon).
- Attach the final report and send it by email to required personnel.



## BENEFITS:

- Manually generating financial reports is a complex and time-consuming process. This process will save the time utilized by the team in making financial statements thereby enabling them to do much valued processes such as evaluation & analysis of the overall performance of the organization.
- When financial statements are made manually, it can often lead to some costly errors. With an automated tool, all data is linked back to original data sources providing a consistent and transparent system that reduces several risks.
- Automation of financial statement consolidation is designed to improve the efficiency in carrying out financial processes. They speed up the process of gathering data and generating reports so employees can focus on other duties.
- Automated financial reporting solutions put the user in control of the process. They define who gets access rights and how protocols are followed.
- It helps in fewer errors and a lower probability of fraud since the financial reporting tool keeps track of each transaction and who was involved.



## Case 4

The regional leading wholesale IT distributor automates its **ACCOUNTS PAYABLE PROCESSES IN ORDER TO SAVE TIME & ELIMINATE ERRORS**

### CHALLENGE:

The Accounting & Operations team has been doing Accounts Payable processing manually leading the employees do time-consuming tasks repeatedly resulting in wastage of time & energy. The management has thus decided to automate the same in order to bring effectivity & efficiency in carrying out day-to-day business & reporting activities.

Currently,

the accounting departments has a huge dependency on manual employee involvement and paper invoices in order to process payments.

The client needed their invoicing and non-payroll payments to be automated.



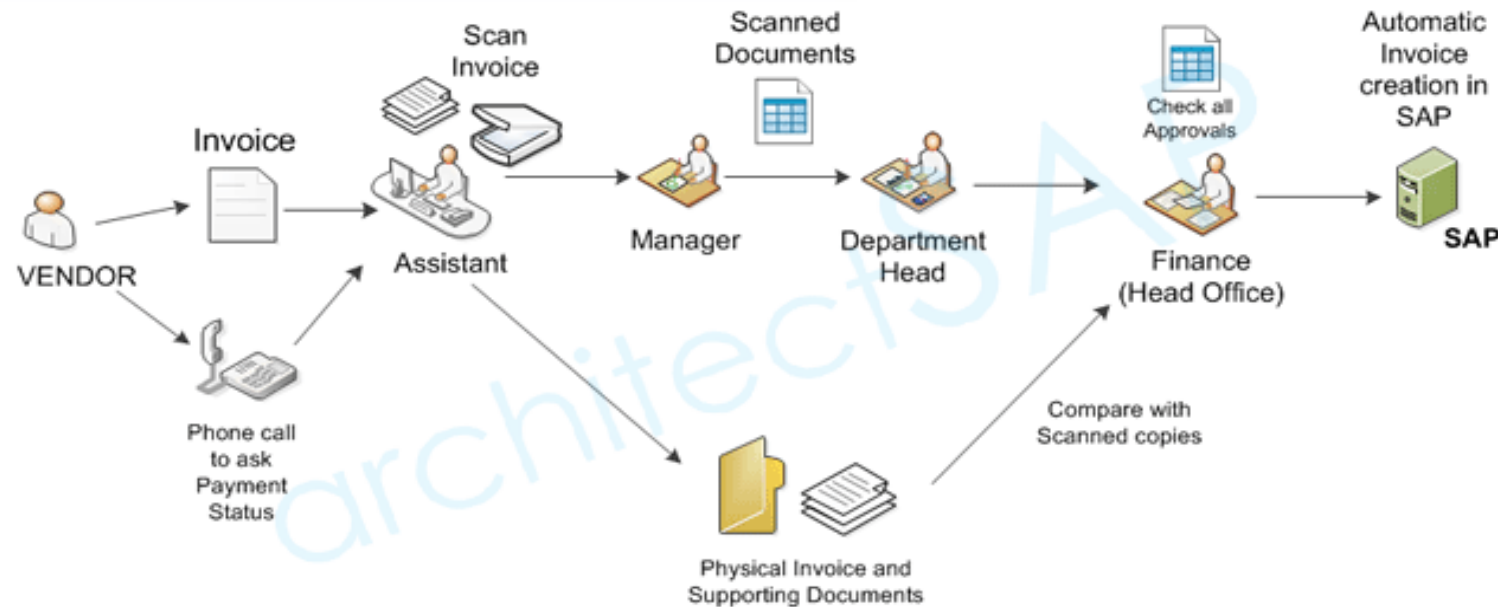
## SOLUTION:

Automation of the entire process starting from receiving the invoice from the supplier via email to cross-verifying the same in the respective Purchase Order to posting of the Invoice in the system.

This is followed by verifying whether the correct accounts have been given the correct effect along with the respective amounts in the ledger book.

## BENEFITS:

- Saves Money
- Saves Time
- Eliminates Errors
- Streamlined, Accurate Processing
- Better Insights & Transparency
- Improved Business Relationships
- Early Payment Discounts



## Case 5

### A leading transport company automates its VEHICLE ONBOARDING PROCESS

#### CHALLENGE:

The vehicle onboarding process at is of key importance for the organisation. It procures 600 vehicles on a monthly basis.

The manual process of onboarding the vehicle is long, tedious and error-prone. A member of the vehicle onboarding team is only able to onboard 4 vehicles in a day.

The Purchase Department receives the Vehicle delivery information from the Supplier via email. The e-mail consists of the Purchase Order and Vehicle Specifications. The Purchase Department has 2 types of Users – Maker/Checker. The maker creates the Inspection Intimation in Oracle by manually picking up information from the email and populating them into the ERP fields across multiple screens. The intimation them moves into the checker workflow for approval. After checker approval the process is complete. This entire process takes considerable amount of time to complete.



#### SOLUTION:

Implementation of Robotic Process Automation in the current Client process helped automate the entire process starting from capturing data from the e-mail using Optical Character Reader to the creation of approved vehicle intimation in Oracle.

#### BENEFITS:

- Reduced Processing Time
- Increased Accuracy
- Data capture & Business Process standardization
- Gain operational efficiency
- Simplify Operations



# Case 6

## SALIK INTEGRATION PROCESS

for a leading trading, transportation and technology company in UAE



### CHALLENGE:

The transport vertical of the Client faces huge accumulation of Salik and Traffic fine data on daily basis which has to be dealt manually.

They want to automate Salik and traffic fines download from the government website, conduct sanity checks on the downloaded data to ensure no duplicates are posted, and then post the data to Fleet ERP.

The current manual process of processing the humungous amount of Salik and Traffic Fines data is tedious, requires long processing time & effort and is highly error prone. The Salik data is download from the Salik website and for traffic fines Abu Dabhi and Dubai traffic websites are scraped separately. This requires the need to login into different websites by different users of the Traffic vertical of the Client. The Client is using Intermediary Database or Staging Tables to temporary store the Fine data before posting it to the Fleet ERP. They do this to make sure that accurate data is posted in the ERP only.

### SOLUTION:

Implementation of Robotic Process Automation in the current Client process helped automate the entire process starting from collecting Traffic Fine and Salik data from various government websites to posting the Final Processed data onto the Fleet ERP.

### BENEFITS:

- The need for staging tables is eliminated
- The client is moved directly into production.
- This resulted in operations cost saving for the Client.
- Reduced Processing Time
- Increased Accuracy



# Case 7

## AUTOMATION OF PROCURE TO PAY PROCESS

for a leading Razor Blade Manufacturer

### CHALLENGE:

The Client has a huge Procure-to-Pay process which entails multiple interaction of Purchase Department with SAP and other internal systems.

- It begins with creation of Requisition Request which goes to Function Manager for approval.
- After approval the Purchase Order is created and sent to the Vendor.
- At delivery, a Good Receipt Note is created and matched with the issued Purchase order to confirm goods.
- Invoice is generated, then approved and then payment is made.

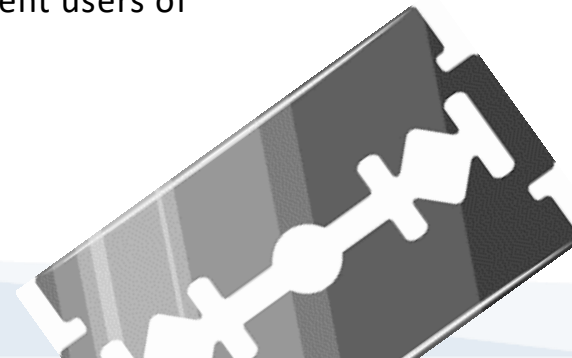
The current manual process of Procure-to-Pay requires long processing time & effort and is highly error prone. It requires the need to login into different systems by different users of the Purchase Department of the Client.

### SOLUTION:

Implementation of Robotic Process Automation in the current Client process helped automate the entire process starting from Requisition Request to Payment.

### BENEFITS:

- Reduced Processing Time
- Increased Accuracy
- Operational cost saving





# Case 8

## REMITTANCE & TELEGRAPHIC TRANSFER ADVICE AUTOMATION

for a leading financial institution in UAE

### CHALLENGE:

The Client is a leading financial institution of UAE. The client receives a huge volume of remittance advices which has to be extracted manually & entered into their banking system. The team also spends a considerable amount of time processing the telegraphic transfers which was thus decided to be automated.



### SOLUTION:

The automation of the manual processes of matching remittance advice information with invoices and reconciling them in the ERP to positively impact your bottom line.

### BENEFITS:

- Reducing manual payment allocation
- Eliminating bank fees
- Allocating cash more quickly
- Improving visibility
- Accounts receivable department will operate more efficiently and cost-effectively
- Improve customer service.



# Case 9

## CUSTOMER/ PURCHASE ORDER PROCESSING AUTOMATION

for a leading pharmaceutical company in India

### CHALLENGE:

The Client is a leading pharmaceutical company in India. Currently in order to process customer/ purchase orders, the staff manually downloads the attachments received in emails in the form of word/ excel files or PDF files. The data is fetched from these attachments & then filed in an excel template which also consists of some hardcoding of data.



### SOLUTION:

The solution is to automate this process by using UiPath RPA and ABBYY OCR data extraction softwares. The data from PDF order documents is extracted using ABBYY, whereas the data from Word and Excel order document is processed directly by UiPath.

### BENEFITS:

- Reducing manual intervention
- Improves Data Quality
- Saving of Time
- Improving visibility
- Improve compliance



# Case 10

## WORK ORDER PROCESSING & INVOICE CREATION AUTOMATION for a leading vehicle maintenance workshop in UAE

### CHALLENGE:

The team does various processes right from receiving the car for maintenance to delivering it back to the owner. It includes fetching of data from various people in the team working on different parts of the same process. Description regarding the tasks to be carried out and the rates to be charged to different customers differ from case to case.

All this information has to be grabbed several times on a daily basis in order to complete the work orders and finally create invoices. These invoices need to be posted in ERP based on the nature of the customer for whom the work is being carried out.



### SOLUTION:

The automation of the manual processing of work orders and entering the invoices in the ERP in order to avoid data handling errors considering a huge volume of data.

### BENEFITS:

- Reduces operation time and work handling time significantly.
- Improves Data Quality
- Saving of Time
- Improved robustness (consistency), of processes
- Increased consistency of output



# Case 11

## SERVICE ORDERS & TAX INVOICE COMPARISON AUTOMATION for a leading vehicle maintenance workshop in UAE

### CHALLENGE:

The finance team receives an average of 5000-6000 LPOs on a monthly basis which has to be manually audited once the maintenance work on a particular vehicle is completed. The team in turn sends a Tax invoice to the supplier after making required changes.

These two documents have to be cross-checked to see if all the parameters are correctly captured. Once verified, the Tax invoice is entered in the ERP system & it is further processed for payments. If there are any discrepancies, the same is notified to the concerned person.



### SOLUTION:

The automation of the manually verifying the LPOs and the Tax invoices, entering the Tax Invoices in the ERP & sending exceptional reports to the concerned person using a Bot.

### BENEFITS:

- Increased throughput or productivity
- Reduced direct human labor costs and expenses
- Reduces operation time and work handling time significantly
- Improves Data Quality
- Saving of Time
- Improved robustness (consistency), of processes
- Increased consistency of output





# Case 12

## SALES ORDERS & INVOICE PROCESSING AUTOMATION

for a leader in houseware segment in India

### CHALLENGE:

The team is doing the same process repeatedly which includes downloading of a number of reports from various portals which are huge in size. Considering the size of these documents, there is a long waiting period & the subsequent job is delayed resulting in slowing down the entire process.

The required reports are currently downloaded from three portals. All these portals have different criteria to download the same documents. The team has to scroll through a number of screens to get the access to these documents. Also the formats of each of the downloaded report is different resulting in creation of a number of excel files, adding filters & sorting activities.

### SOLUTION:

The automation of the entire process right from downloading the reports from various portals to processing the data & resulting in data entry of the same in SAP.

### BENEFITS:

- Saving of Time
- Improved robustness (consistency), of processes
- Increased consistency of output
- Increased throughput or productivity
- Reduced direct human labor costs and expenses
- Reduces operation time and work handling time significantly
- Improves Data Quality



**THANK YOU**

