

# RPA Overview

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# What is Robotic Process Automation (RPA)?



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# RPA: Robotic Process Automation Described




RPA is the application of software “robots,” not physical robots, that mimics human action and connects multiple systems through automation without changing the existing IT landscape

## RPA is integrated in an existing IT infrastructure



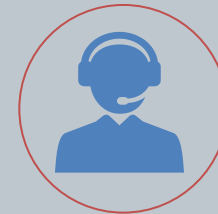
As a renewal of the existing IT landscape is not required, a high level of automation can be reached without major effort. RPA uses established control mechanisms and can communicate with all systems. Therefore, no interface has to be created.

### RPA is a software



RPA is a computer software that runs repetitive, rule-based processes. The software is trained based on functional specifications and can be adjusted at any time.

## RPA simulates an employee



The software robot has access to diverse applications with an ID or a password. The robot can gather information or change data. Consequently, business and administrative processes can be fully automated.

## Capabilities

- Log into applications
- Enter data from excel
- Collect, move data and files
- Formulate data
- Fill in forms
- Open emails & attachments
- Extract structured and semi structured data from documents
- Scrape browsers
- Report generation
- Read databases
- Follow if/then decisions



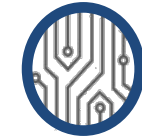
# USE CASE CHARACTERISTICS

- Tedious, repetitive tasks
- High-volume transactions
- Rules-based answers
- Manual work prone to errors
- Tasks performed outside office hours
- Existing work supported by algorithms or macros



## **Deterministic** *(Rule-Based)*

The process contains a **defined set of tasks** required for execution



## **Digitized** *(Electronic)*

The data required for the process can be **accessed electronically**



## **Documented** *(Well Defined)*

The process is transcribed with the **appropriate details**



# RPA Use Case Examples

## Finance & Accounting

- Billing / Invoicing
- Payments processing
- Cash application
- **Reconciliations**
- JE support
- Costing
- Fixed Assets
- Incentive claims
- Closing procedures
- A/R follow up & credit analysis
- Reporting
- **Grant Closing procedures**

## HR Services

- Recruiting
- Onboarding
- Payroll processing
- Benefits administration
- **Time & attendance management**
- Education and training
- Off-boarding
- Compliance Reporting
- **Position number reconciliations**

## IT Services

- Software Installations
- Data migrations
- Application testing
- Server application monitoring
- Identity & access management
- Security monitoring
- Help Desk management
- Policy distribution & compliance reporting

## Higher Education

- Course registration
- Enrollment process
- **Transcript Evaluation**
- Shortlist candidates
- Attendance management
- Eligibility criteria check
- Schedule meetings
- Equipment reservations
- Student Withdrawal Expense
- Mailing
- State reporting
- Student closing reports

## Risk & Controls

- Quality audits
- Compliance audits
- Internal audit enablement
- Security tracking & monitoring
- Technical threat & vulnerability management
- Access management

## Supply Chain

- Spend categorization & reporting
- New vendor setup
- Contract creation & updates
- **Contract compliance audits**
- **Contract reporting**
- Quote & invoice management
- Returns processing
- Freight management
- Inventory management
- Capital equipment requests

## Revenue Cycle

- **Eligibility Checking**
- New patient appointment requests
- Patient pre-arrival and arrival
- **Claim denials**
- Credit balances
- Medically Unlikely Edits
- Billing inquiries
- Code changes
- **Identify payor and physician underpayments/overpayments**

## Customer Relationship Management

- Customer setup and master data mgmt.
- Password resets
- Appointment scheduling
- Downloading customer profile to Contact Center employee
- Automated Contact Center reporting
- Anticipate customer needs and follow up
- Pareto ranking of issues
- Automating internal reporting of customer inquiries and issues

*Highlighted use cases are those that IASG have worked.*



# To Learn More About RPA

Please refer to the resources and webinars located at

<https://www.utsystem.edu/offices/collaborative-business-services/intelligent-automation-services-group>



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# Objective of UT System RPA Initiative



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# Background and Program Objectives

- Started in 2018, this initiative has a significant opportunity to help each UT System institution **“to do more with the same.”** Automating manual, mundane, repetitive, rules-based tasks that can be done outside of normal business hours may be very advantageous in controlling administrative costs in the years ahead.
- Key objectives
  - Reduce operating cost and/or increase revenue
  - Increase productivity, reduce errors and improve quality
  - Reduce exposure to risks and enhance compliance
  - Enhance customer service
  - Increase employee satisfaction
  - Improve information available for decision-making and planning
- Programed managed by UT System Office of Collaborative Business Services-Intelligent Automation Services Group





# How is the program governed?



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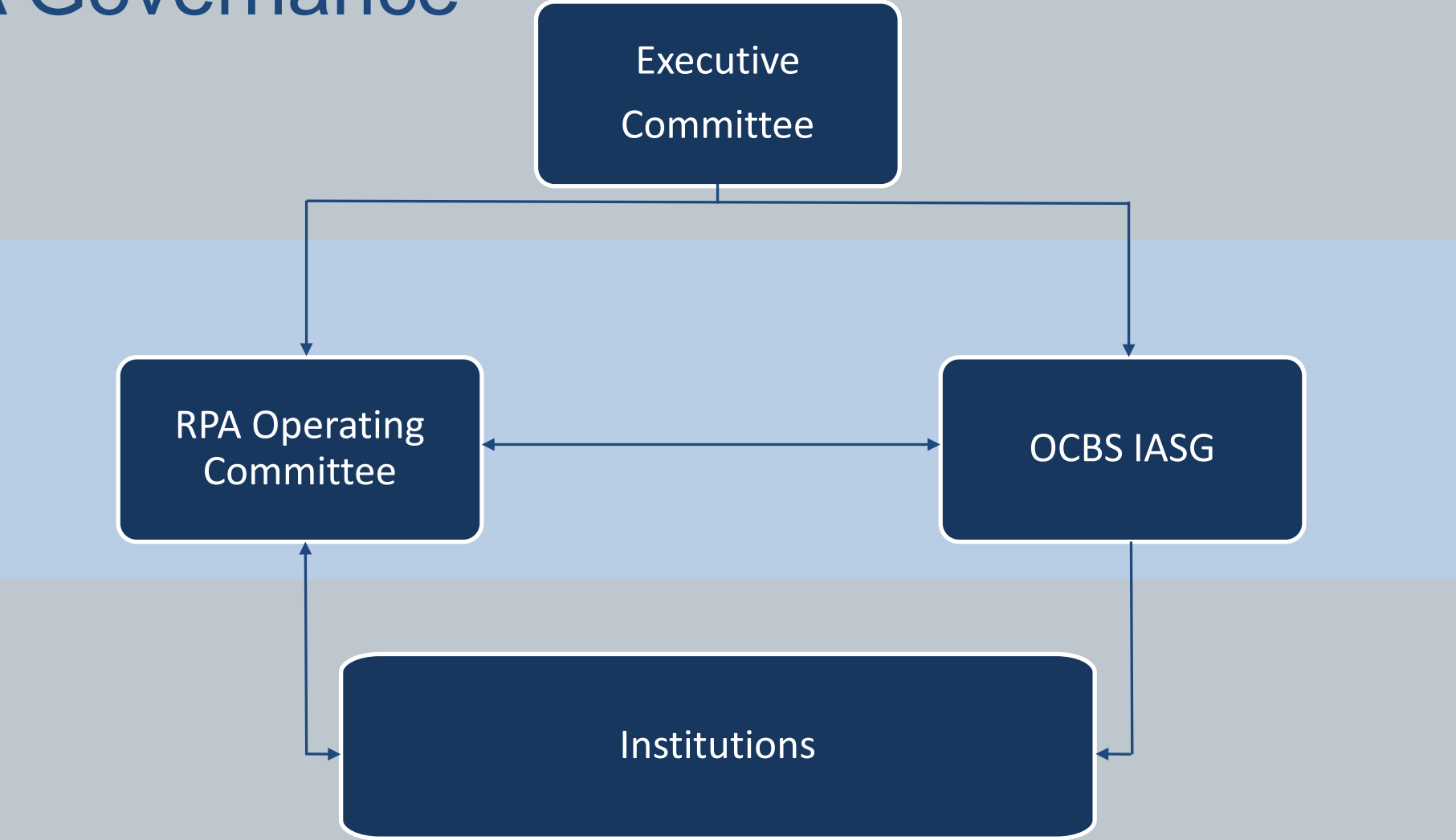
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# Governance Framework

The governance framework is established to focus on RPA development, financial planning, resource management, and control and risk management. The framework promotes cross campus collaboration, and tracks program scalability and value.



# RPA Governance



# RPA Governance Body

## UT System OCBS Executive Committee

- Approves strategic direction, annual OCBS work plan and budget, projects and related budgets and monitors performance.
- Members comprised of Chief Business Officers from each UT System Institution.

## UT System RPA Operating Committee

- Members comprised of representatives from institutions that are appointed by CBO
- Develops and recommends activities to the EC that achieve the RPA Strategy, operationalize lessons learned, and deploy new process automations.
- Develops RPA program expertise and shares knowledge
- Serve as Institution's communication conduit and RPA champion
- Recommends use cases and program improvements

IASG is a division of the UT System Office of Collaborative Business Services (OCBS) that provides the following services:

- Webinar & Education Programs
- Business Process analysis for automation
- Automation Design and Development
- Hosting and Monitoring Services
- Consulting Services



# What is the Robotic Process Automation Operating Model (ROM)?



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# Purpose of Robotic Process Automation Operating Model (ROM)

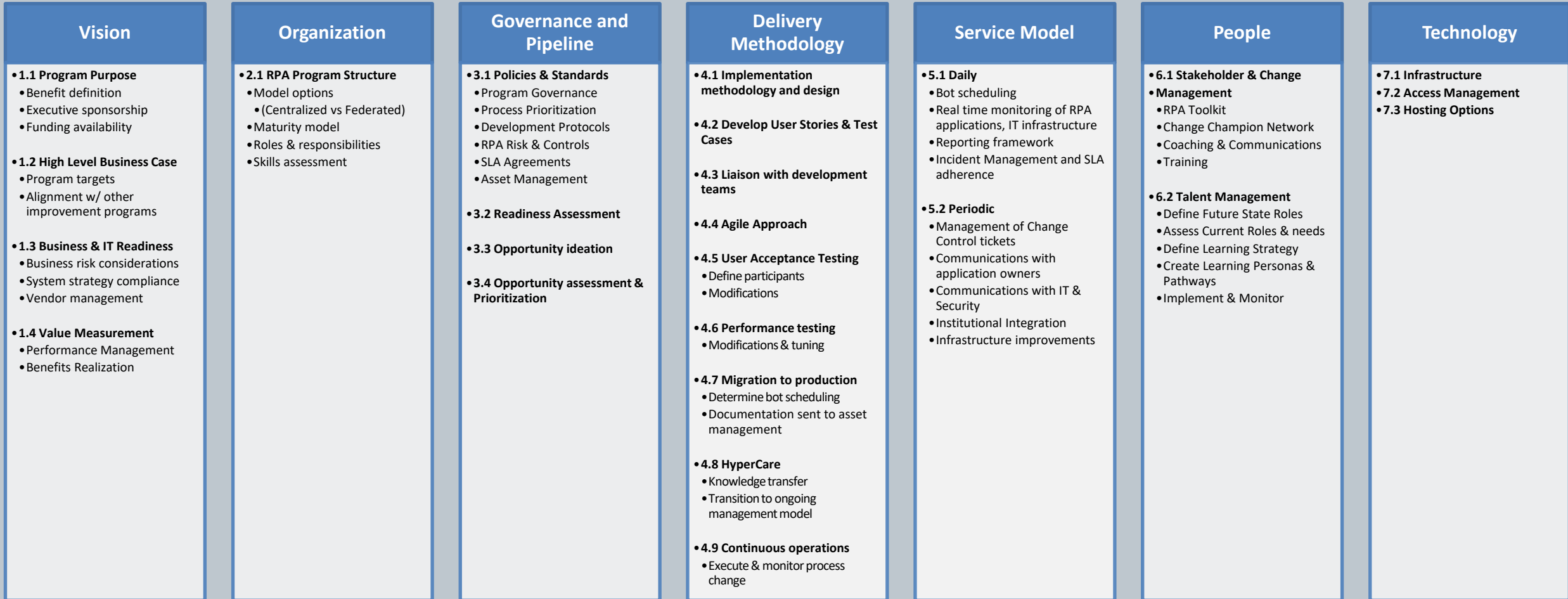
The ROM is to be used as both a reference guide and tool to help guide IASG and Institutions through the RPA journey. It contains seven integrated pillars to ensure value realization. It demonstrates a formally structured, reusable framework and processes for a sustainable RPA Operating Model that will allow the program to consistently apply methodologies and deliverables. Elements include governance, roles & responsibilities, ideation, deployment, and support.

IASG has established templates that are available to each institution, such as functional and design documents, unit testing scripts. In addition, IASG can provide the expertise in best practices and standards related to topics in ROM.



# RPA Operating Model (ROM)

## Seven integrated Pillars to ensure value realization



# Additional Resources

- The UT System RPA ROM can be found at the [UT System OCBS Resources website](#).
- Foundation and principles of the Blue Prism ROM can be found at [ROM Hub - SS&C Blue Prism Community](#)
- Blue Prism ROM Certification [Blue Prism University | Homepage](#)





# Are Digital Workers safe and secure?



# Digital Workers are Safe Because...

## Security Access and Privileges

- A digital worker is assigned access and privileges like a human worker. Their credentials are stored in a secured credential manager within the Blue Prism application.

## Separation of Duties

- Roles of system admins, developers, and bot controllers are segregated within the application.

## Security Audits

- Digital identity and access management is provisioned with an audit feature that allows tracking of all activity performed by the digital worker.
- Digital workers only follow prescribed rules.

## End to End Encrypted Data



# Information Security and the Digital Workforce Webinar

The Information Security and the Digital Workforce Webinar is a presentation shared by a Blue Prism Enterprise Architect that covers security governing principles. Topics include network security, credentialing, access restrictions, user profiles, authentication, authorization, encryption, and the architecture design.

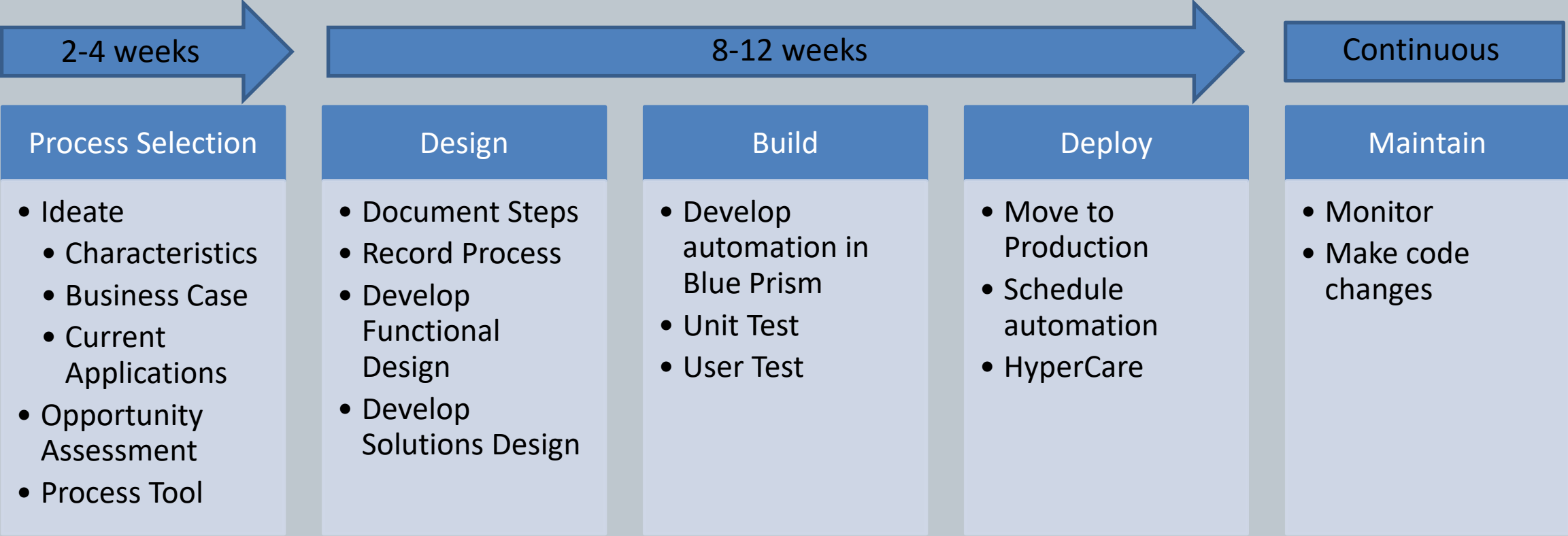
A copy of the video and presentation can be found the at the [UT System OCBS Webinar website](#).



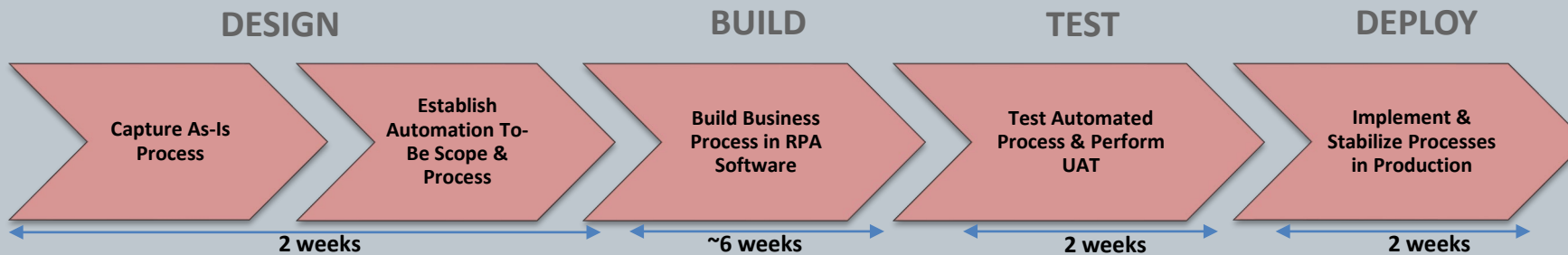
What is the process and time commitment to automate a process?



# Build a Digital Worker

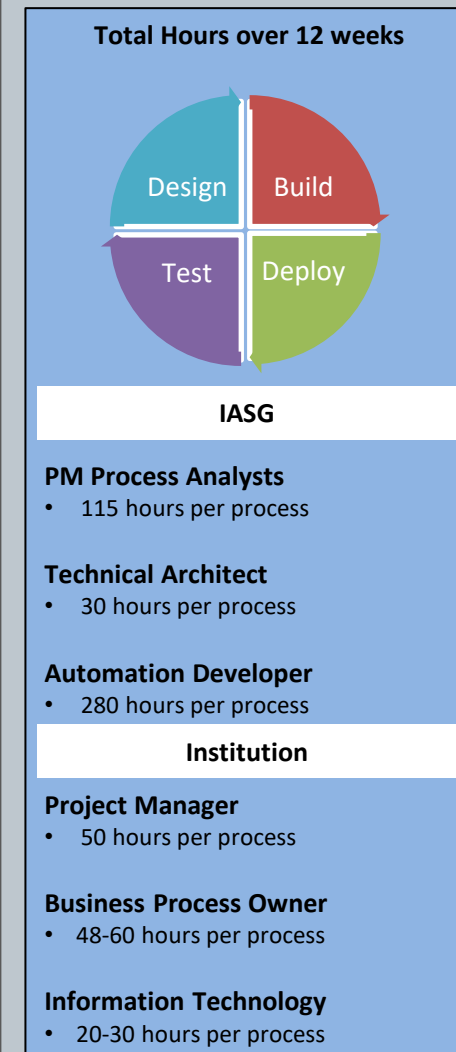


# Roles & Responsibilities Per Process



## Roles and Time Commitments

IASG	IASG	IASG	IASG
<p><b>Process Analysts</b></p> <ul style="list-style-type: none"> <li>Creates the functional design documents (FDD) with Business Units</li> <li>Establishes sprint activities</li> <li>Maintains repository for all documentation</li> <li>Support institutional project manager activities</li> </ul> <p><b>Technical Architect</b></p> <ul style="list-style-type: none"> <li>Develops solution design, feasibility</li> </ul>	<p><b>Process Analysts</b></p> <ul style="list-style-type: none"> <li>Supports Build process</li> <li>Support institutional project manager activities</li> </ul> <p><b>Technical Architect</b></p> <ul style="list-style-type: none"> <li>Oversees developers, sets coding standards</li> </ul> <p><b>Automation Developer</b></p> <ul style="list-style-type: none"> <li>Codes in selected software.</li> </ul>	<p><b>Process Analysts</b></p> <ul style="list-style-type: none"> <li>Creates the testing template with business unit</li> <li>Support institutional project manager activities</li> </ul> <p><b>Technical Architect</b></p> <ul style="list-style-type: none"> <li>Oversees testing requirements</li> </ul> <p><b>Automation Developer</b></p> <ul style="list-style-type: none"> <li>Tests in selected software.</li> </ul>	<p><b>Process Analysts</b></p> <ul style="list-style-type: none"> <li>Supports transition</li> <li>Support institutional project manager activities</li> </ul> <p><b>Technical Architect</b></p> <ul style="list-style-type: none"> <li>Guides the migration to production</li> </ul> <p><b>Automation Developer</b></p> <ul style="list-style-type: none"> <li>Provides stabilization support</li> </ul>
Institution	Institution	Institution	Institution
<p><b>Project Manager</b></p> <ul style="list-style-type: none"> <li>Provides project oversight, workshop coordination, communication, and obtains sign-off on FDD.</li> </ul> <p><b>Business Process Owner</b></p> <ul style="list-style-type: none"> <li>3-4 sessions (2 hours each) to understand processes</li> <li>4-6 hours for review of proposed solution (FDD) and sign-off</li> <li><b>ACCEPTANCE:</b> Sign off on Functional Design Document</li> </ul> <p><b>IT</b></p> <ul style="list-style-type: none"> <li>6-8 hours to sit in process workshops and assist with to-be updates to systems, if needed</li> <li>2-4 hours to set up access needs to systems such as PeopleSoft, networks, etc.</li> </ul>	<p><b>Project Manager</b></p> <ul style="list-style-type: none"> <li>Manages sprint activities</li> </ul> <p><b>Business Process Owner</b></p> <ul style="list-style-type: none"> <li>4 hours per week to review progress and provide clarifications</li> <li>Time to prepare test data &amp; scenarios</li> <li>Validate demos of bots working</li> </ul> <p><b>IT</b></p> <ul style="list-style-type: none"> <li>2-4 hours for access updates, technical troubleshooting</li> </ul>	<p><b>Project Manager</b></p> <ul style="list-style-type: none"> <li>Manages sprint activities</li> <li>Coordinates UAT scripts, and obtains signoff.</li> </ul> <p><b>Business Process Owner</b></p> <ul style="list-style-type: none"> <li>6-8 hours per week for User Acceptance Testing and feedback on results</li> <li><b>ACCEPTANCE:</b> Sign off on successful test scenarios</li> </ul> <p><b>IT</b></p> <ul style="list-style-type: none"> <li>4-6 hours per week for User Acceptance Testing review; access updates</li> </ul>	<p><b>Project Manager</b></p> <ul style="list-style-type: none"> <li>Manages sprint activities</li> <li>Reconciles deliverables; i.e., (FDD, SDD, Invoices)</li> </ul> <p><b>Business Process Owner</b></p> <ul style="list-style-type: none"> <li>2-4 hours to review of production results (dependent on frequency of process)</li> <li><b>ACCEPTANCE:</b> Sign off on stabilization in production (# of successful runs)</li> </ul> <p><b>IT</b></p> <ul style="list-style-type: none"> <li>2-4 hours to assist with any technology issues</li> </ul>



# How do I determine what to automate?



# Automation “Use Case” Characteristics

- Tedious, repetitive tasks
- High-volume transactions
- Rules-based answers
- Manual work prone to errors
- Tasks can be performed outside normal office hours
- Existing work supported by algorithms or macros





# Opportunity ideation

## Use Case Characteristics for RPA

Business Unit Support will identify and submit processes as potential RPA opportunities. All submissions **must** include and meet the following minimum conditions<sup>1</sup> to be recognized as a suitable candidate:

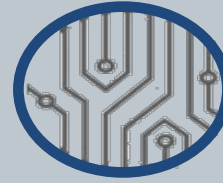


### Deterministic (Rule-Based)

The process contains a **defined set of tasks** required for execution

A process is deterministic if:

- ▶ There is a sequential series of tasks with fixed start and end conditions
- ▶ There is no randomness or judgement (i.e., the process is rule based) in outcomes



### Digitized (Electronic)

The data required for the process can be **accessed electronically**

Examples of digitized storage include:

- ▶ Local PC drive
- ▶ Shared network drive
- ▶ IT Application / database



### Documented (Well Defined)

The process is transcribed with the **appropriate details**<sup>2</sup>

Critical details include:

- ▶ All business process owners
- ▶ Instructions for executing each process task
- ▶ Key business/ system exceptions and corresponding workarounds

<sup>1</sup> Additional criteria may be introduced at various stages of the RPA program to reflect the goals and scope

<sup>2</sup> Keystroke documentation will not be required at the identification phase

# High-level business case

Analytics helps validate overall goals, allocate goals to specific areas and prioritize further assessment and implementation activity play a role?

## Coverage – Creating the funnel

**Pipeline size:** Typically ratio equals 3x opportunities identified to realized savings target

**Functional breadth:** In order to generate sufficient opportunities program scope should consider multiple functional areas

**Actual benefit realization:** Full benefits are usually realized 2-3 months after deployment therefore it is important to identify quick wins

**Implementation pipeline:** Opportunity pipeline should include functional and technical diversify to allow for parallel workstreams

## Benefit realization - Maximizing the funnel throughput

- Materiality** - Identify largest dollars and FTE's including areas of high growth (potential cost avoidance)
- Most variable labor** - Focus on contingent labor, outsourced tasks, Global Business Services (GBS) and OT for retained FTEs
- Easiest path to realization**
  - Executive sponsorship
  - Discreet activities (HC 100% dedicated to activity)
  - Maximum concentration (transactions and FTE) per tower
  - Non-customer facing or critical process
  - Limited impact to existing systems
  - Existing skills for RPA technology
- Complexity/ feasibility**
  - Data quality/ integrity
  - Process and/or system stability
  - Compliance sensitivity

## Opportunity identification and roadmap creation

Revenue Cycle

Supply Chain

Finance

Student Services

Function

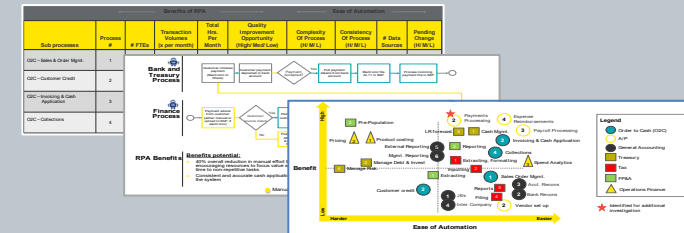


Process identification



Prioritization analysis

Business Case & Roadmap



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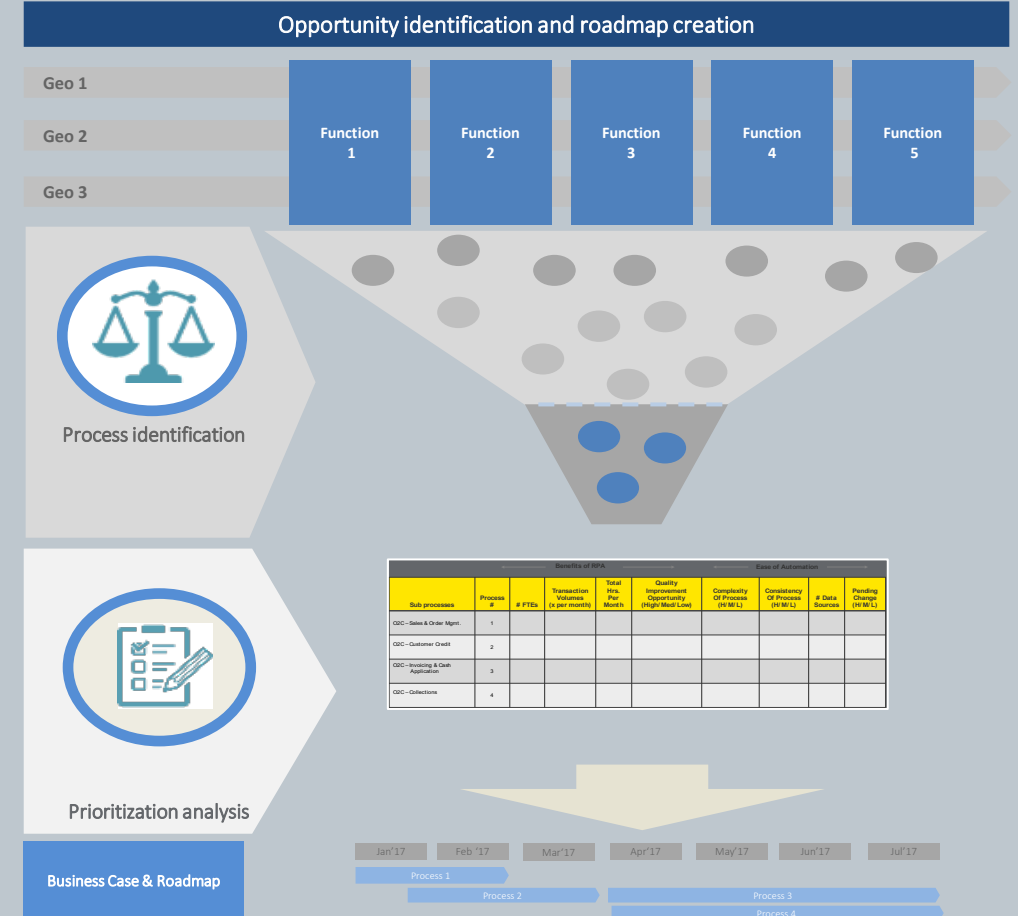
# Opportunity/Process Assessment Success Factors

## Approach

- Identify process automation opportunities by function / institution (pre-work by institution to gather needed information on process, sub-process, task, etc.)
- Process owners participate in workshops over a three-week timeframe for two to four hours to review a selected Function (Finance, Budgeting, Rev Cycle, Supply Chain, or HR) for automation potential and value

## Success Factors

- Inventory of processes by functions
- Process documentation available
- Headcount and effort tied to processes available
- Availability of Process Owners during Opportunity/Process Assessment workshops
- Minimal competing initiatives during workshops



What process can be automated? What processes has UTS automated?



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# UT System Institutions' Projects in Production

## Value Achieved From Feb 2019 thru FY24-Q2 (Feb 2024)

UTA	UTEP	UTPB	UTSA	UTT
Grant Close Feb 2019 \$116,326	Grant Close May 2023 \$119,668	Grant Close Apr 2023 \$37,909	Grant Close May 2023 \$28,577	Review & Validate Mar 2019 \$233,974
Sahara UTS142 Notifications Close Announcement Nov 2023, Reminder Notice Dec 2023, 30 Day Past Due Jan 2024 60 Day Past Due Feb 2024 \$122,500			TRS Recon TBD	TMHP Medicaid Jan 2023 \$2,455
				Grant Close Jan 2024 TBD
UTSWMC	UTHSCH	UTHSCSA	UTMDACC	UT System Admin
TMHP Medicaid Apr 2021 \$9,435,300	Review & Validate Feb 2019 \$1,352,820	TMHP Medicaid Mar 2020 \$15,935,652	Payor Under/Over Payment Apr 2022 \$1,171,822	LBB Reporting Nov 2021 \$77,942
Medical Records Denial Nov 2022 \$262,000			TMHP Medicaid Jul 2022 \$1,103,986	GPO Aug 2023 TBD
			Agency Nursing Timekeeping Dec 2023 TBD	

Total Hours Saved 72,971 (39 FTEs)  
Aggregate Value Achieved \$30M



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# Automations in Development

## Academic Institutions

Submitted Institution	Process Area	Process Name	Description	Target Completion – FY24	Status
UTA	Finance	SAHARA Notification for 120 Days past due	This process is the last of the six automations for SAHARA notifications for cost centers that have not been reconciled or approved, and that are 120 days past due. An email is sent to reconcilers, managers, owners, department leadership, compliance, and the VP for Business and Finance.	Q3	UAT
UTSA	Supply Chain	Missing Receiving Receipts Updates to PO	Missing Receiving Receipts for electronic Rowdy Exchange POs that convert to electronic vouchers for DTS. That process requires a team member to manually push back the date in Rowdy Exchange once a week, so items on PO can be received that weren't previously received.	Q4	Design
UTSA	Student Services	Loan Refund	Parent Plus Loan refund processing utilizing Banner report AR_F404 Loans_Holds_Rpt (student info) and the TSARREV (refund amt), and generate voucher in PeopleSoft.	Q4	Design
UTSA	Payroll	Pre-Distribution Audit	Replicate finding source of funding discrepancy when paysheets are open This particular process would need more details but could be used at other UTShare institutions.	Q4	Design
UTT	Payroll	Teacher Retirement System (TRS) Reconciliation	Compares TRS portal file to PeopleSoft check query by downloading files from both databases. Then reconciles EE and ER payments to HCM journals.	Q3	Build
UT System Admin	Supply Chain	HUB Reporting	Monthly HUB reporting that pulls a report of expenditures, removes exceptions, reconciles that data against the TPASS report, and delivers the output report to a shared network folder.	Q4	Design



# Automations in Development

## Health Institutions

Submitted Institution	Process Area	Process Name	Description	Target Completion – FY24	Status
UTHSCSA	Research	Clinical Trials Office Invoice Creation	Entering study details in REDCap, updating study information in REDCap, and creating invoices for clinical trials in REDCap.	Q3	Design
UTHSCSA	Research	Clinical Trials Office Invoice Follow-up	Creating a report of invoices over 120 past due	Q3	Design
UTMDACC	Nursing Services	Agency Nursing Monthly Timekeeping	Provide monthly time calculation out of Kronos and calculate to daily time, including overtime for each nurse for an entire month. This report will capture any Kronos corrections made to the nurse's time for the month. The data will then be separated by the nursing agency and an: 1. Accounts Payment voucher is created 2. Payment created for the nursing agency	Q3	UAT



# Automations in Proof of Concept

Submitted Institution	Process Area	Process Name	Description
UTPB	Student Services	Transcript Evaluation	<p>Uses OCR Decipher to collect Undergraduate Transfer Transcript data. Uses RPA to accept the student in slate, CRM. Slate sends a notification for transcript updates. As is processes takes 3 admission counselor to work transcripts. Majority of the processes are electronic transfer, but some are pdf mailed form (100+ in a week). Will require OCR. There is an frequent change of rules. File parser upload.</p> <p>Updates when students take courses while still enrolled in university and needs to be updated.</p>
UTMDACC	Accounts Payable	Invoice Processing IDP Solution	Create PeopleSoft vouchers from invoices





# Automations in Evaluation or Pre-Design

Submitted Institution	Process Area	Process Name	Description
UTEP	Student Services	Closing Reports Summary	Run report three times a day using the Banner interface and copy the sequence id, and totals into the closing report log numbers excel worksheet.
UTEP	Student Services	Withdrawal Expense Summary	Pull refund detail and amount data from Tab 1, 2, & 4 into a single output after the no refund date for each POT. Make adjustment calculation for student with multiple parts of term. The digital worker should be able to create a final file ready for upload to clear accounts.
UTEP	Student Services	Drop Students	Drop students in the Banner system that have not paid their fees.
UTRGV	Grants Finance	Grants Close	Identify and create workbooks for grants that are ready to be closed. Prepare the workbook for each grant for the Grant Specialist to review.
UTRGV	HR Benefits	TRS	Compares TRS portal file to PeopleSoft check query by downloading files from both databases. Then reconciles EE and ER payments to HCM journals.
UTT	Student Services	Patriot Promise Management	Run five queries from PS CMS production, clean up such as deleting rows, merging cell data, calculations. Produce a single output file of students eligible to receive the Patriot Promise distribution. If permitted to allow digital worker to batch upload.
UTT	Student Services	Federal Reconciliation	Reporting spend by running several queries such as UT Share Balance, Awards, Disbursements, and COD reports. Compile data and identify discrepancies.
UTT	Human Resources	Ci Process	The Ci Process is employed to execute approved changes from eForms to PeopleSoft due to the absence of autorun in PeopleSoft. The process involves a validation step and the sending of manual email notifications. Validations include checks against job data and identification of errors. The business is expected to address the validation effort. The Ci Process impacts approximately seven eForms related to job changes, encompassing activities like hiring, termination, job attributes, and assignment transfers.
UTT	Finance	Reconciliation – Fixed Assets to GL	A monthly review of fixed asset and General ledger activity is done to ensure Year end Schedule S on the AFR is properly reported.
UTHSCSA	Revenue Cycle	Medical Records Denials	Submits claims denials reconsideration to payors website when additional information additional information (such as clinical notes, visit summaries, case history etc.) are requested by the payor to review a denied claim.



# Automations in Ideation

A complete list of automations in ideation can be found on the IASG website:

<https://www.utsystem.edu/offices/collaborative-business-services/intelligent-automation-services-group>



# Who is IASG? What services does IASG provide?



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# Who is IASG

Intelligent Automation Services Group (IASG) is an internal support group that serves all UT System Institutions for business process automation utilizing RPA and Intelligent Automation tools.

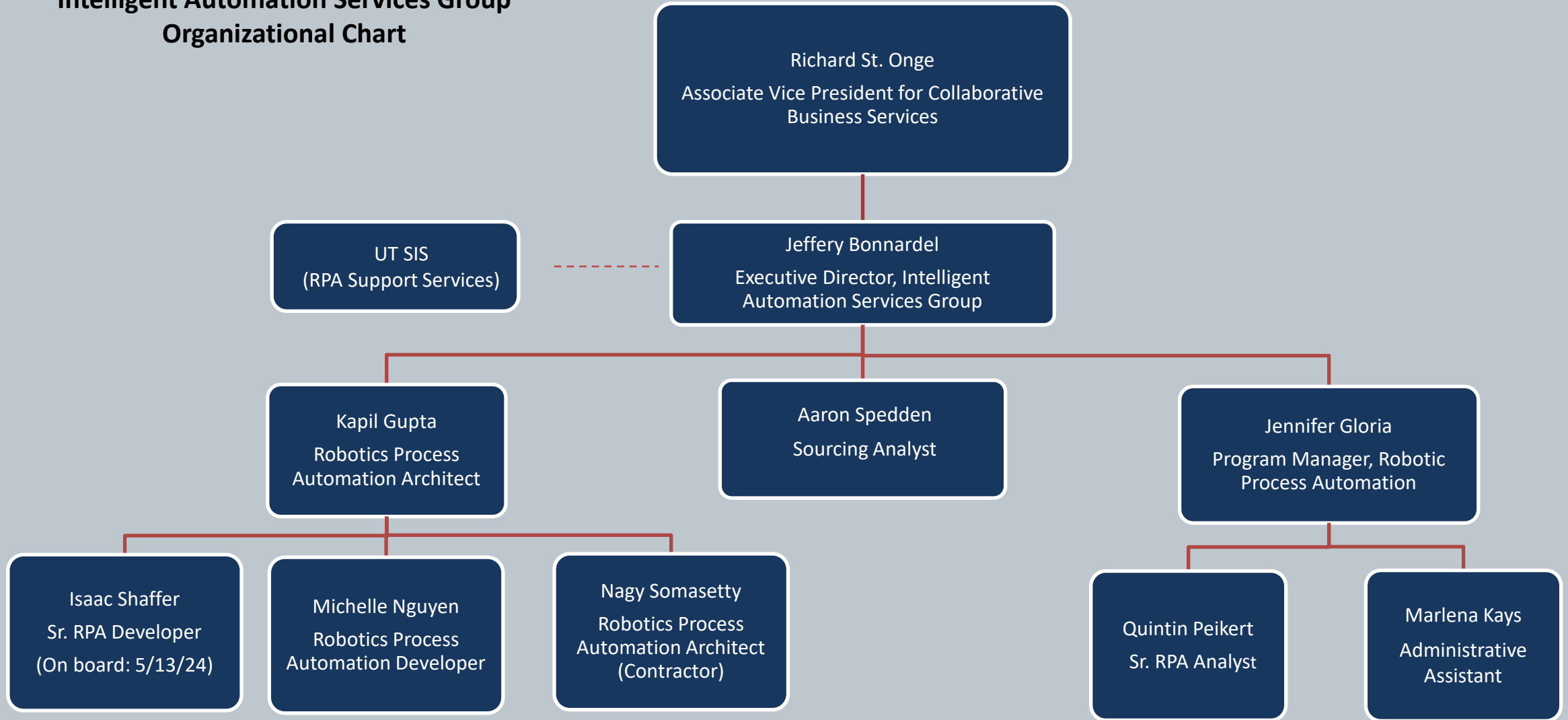


# Intelligent Automation Services Group Offers

- Webinar & Education Programs
- Business Process analysis for automation
- Automation Design and Development
- Hosting and Monitoring Services
- Consulting Services



**Office of Collaborative Business Services  
Intelligent Automation Services Group  
Organizational Chart**



# Intelligent Automation Services Group (IASG)

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Nagy Somasetty	Robotics Process Automation Architect (Contractor)	<a href="mailto:Nagy.s@binaryway.com">Nagy.s@binaryway.com</a>
Marlena Kays	Administrative Assistant	<a href="mailto:mstkays@mdanderson.org">mstkays@mdanderson.org</a>



# Has RPA delivered value to UTS?





# Value Creation through FY24 Q2

Institution	Process	Started	FY19	FY20	FY21	FY22	FY23	FY24	Totals
UTMDACC	Grant Cash Reconciliation	FY19	\$27,422	\$54,844	\$54,844	\$13,711	N/A	N/A	\$150,821
UTHSCH	Review & Validate	FY19	\$133,236	\$266,472	\$266,472	\$266,472	\$279,702	\$ 140,466	\$1,352,820
UTT	Review & Validate	FY19	\$20,466	\$40,932	\$40,932	\$46,840	\$51,995	\$32,809	\$233,974
UTHSCSA	TMHP Medicaid Eligibility	FY20		\$532,982	\$2,637,042	\$5,929,976	\$4,571,921	\$2,263,731	\$15,935,652
UTSWMC	TMHP Medicaid Eligibility	FY21			\$2,143,455	\$3,208,658	\$3,515,718	\$567,468	\$9,435,300
UT System	LBB System Adm	FY21				\$17,658	\$36,700	\$23,583	\$77,942
UTMDACC	Underpayment Overpayment	FY22				\$282,046	\$395,894	\$493,882	\$1,171,822
UTA	Grant Close	FY22				\$14,464	\$70,716	\$31,146	\$116,326
UTMDACC	TMHP	FY22					\$826,046	\$277,939	\$1,103,986
UTSWMC	Financial Aid	FY22					\$10,500	N/A	\$10,500
UTSWMC	MR Denials	FY22					\$213,000	\$49,000	\$262,000
UTPB	Grant Close	FY23					\$17,356	\$20,553	\$37,909
UTSA	Grant Close	FY23					\$6,826	\$21,751	\$28,577
UTEP	Grant Close	FY23					\$39,896	\$79,792	\$119,688
UTT	TMHP	FY23					\$489	\$1,966*	\$2,455
UTA	Sahara UTS 142 Notifications	FY24						\$122,500	\$122,500
<b>Totals</b>			\$181,124	\$895,230	\$5,142,745	\$9,779,826	\$10,036,759	\$4,126,587	\$30,162,272



# How to Get an RPA Program Started



# Key activities to get started include...

- Defining Organizational Objectives (Vision & Strategy)
- Establishing RPA Governance
- Determining Technical Environment & Support Model (e.g., IASG, In-house, 3<sup>rd</sup> Party)
- Selecting Delivery Team (e.g., IASG, In-house, 3<sup>rd</sup> Party)
- Ensuring stakeholders on-board
  - Information Security
  - IT
  - Compliance
  - Internal Audit
  - Employees

*The IASG Team is available to assist you with any of these activities.*

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# How Do I Build a Process Automation?



# How to Build a Process Automation

- Select Process
- Document-Map Process
- Establish Team
- Key Decisions
- Design
- Build
- Test
- Deploy



# Select a Process

- Identify potential processes for automation that meet use case characteristics
- Consider processes which can not be improved through existing application.
- Perform a process assessment to determine automation potential of processes selected (e.g., potentials savings, complexity of build, risks, and limits).
- Ensure it meets RPA requirements
  - Digitized
  - Deterministic
  - Documented



# Document Process

- Create detail step by step procedures of the process (SME & Business/Process Analyst)
- Create the Functional Design Document -Flow chart current and new process (Business/Process Analyst)
- Create the Solution Design Document (Technical Architects)



# RPA Team

- Capture Current Process – Subject Matter Expert (SME) and RPA Analyst
- Establish Scope – Process Owner, SME, and RPA Analyst
- Document To Be State – RPA Analyst
- Configure Automation – Blue Prism Developer
- Test Automation – Unit Testing Blue Prism Developer and SME
- UAT Testing – SME, Developer, and RPA Analyst
- Finalize Process Documentation – RPA Analyst
- Deploy and Stabilize – Technical Architect and Monitor Team





# Key Decisions

- What, if all, of the process will be automated?
- How often will the digital worker run, i.e. frequency, hours, days of the week?
- Do you need a SQL server to capture large data sets?
- How many licenses will you need?
- Will the environment reside at your institution or UT SIS?
- Who will support and maintain the automation?



# Design

- Functional Design Document - a document that details the business process that is to be automated. Once agreed as the basis for the automation of the target process, will be used as a platform from which the automated solution will be designed.
- Solution Design Document - a comprehensive document containing, not only high-level details of how the developer will deliver the solution in the RPA platform, but also includes details of other deliverables that are required for the solution (i.e. web services, database tables, web forms etc.) and on other details such as security, scheduling, alerting, management information, and exception handling.



# Build

Once the solution design document has been developed, then the solution must be reviewed and agreed upon by the process owner, IT, implementation team, and delivery team to ensure successful delivery.

An RPA Developer is then tasked to build out the solution using business objects in the Blue Prism application studio.

The developer will need requirements during this phase such as the input and output files, and test data to prove the object logic.



# Blue Prism Tutorial Video

[Blue Prism Video Tutorial | 010 | Introduction to process studio and creating a simple process - YouTube](#)



# Test

The aim of testing is to deliver solutions that meet business requirements and contain the minimum possible number of faults.

- Unit testing is testing the performance of the automation, environment, and stability.
- User Acceptance testing is validating the output, and meeting expectations.



# Deploy

## Move to Production

- HyperCare
  - Move to Production HyperCare where automation is in production but is closely being monitored by the delivery team. Once stability is achieved, knowledge transfer occurs between developers and the monitoring team.
- Business as Usual (BAU)
  - Routine operations



# Things to Remember – Lessons Learned

- Get Information Security approval before you start the process
- Make sure all interested Parties are involved, (ISO, Audit, Compliance, Process Owners SME, etc.)
- Involve a Technical Architect at design to advise, and create solution design
- Get credentials for the DW to the appropriate applications
- Determine when the automation can run and how long
- Try and determine number of DW needed
- Unit Testing done by developer and with Process SME, and should run end to end to simulate production
- UAT should run end to end to simulate production
- Don't develop in a vacuum, engage the process SME



# RPA Video

- [https://www.youtube.com/watch?v=5JJCZlclC1Q&list=PL4SEtvjUqihFh-iFvb\\_s0VAhPCX1tzg2A&index=3](https://www.youtube.com/watch?v=5JJCZlclC1Q&list=PL4SEtvjUqihFh-iFvb_s0VAhPCX1tzg2A&index=3)
- Please visit the UT System OCBS Webinar website for the How to Build a Digital Worker Webinar





# How do I get started?



# Identify Process

- Select a process that meets the use case characteristics
- Ensure it meets RPA requirements
  - Digitized
  - Deterministic
  - Documents
- Conduct a process assessment to determine potentials savings, complexity of build, risks, and limits.
- Consider processes which can not be improved through existing application.

*The IASG Team is available to guide you on these requirements.  
IASG@mdanderson.org*



# Have a good internal team

Include key stakeholders to ensure proper RPA development workflow, financial planning, resource management, control and risk management, and to prevent potential delays.

- Information Security
- IT
- Compliance
- Internal Audit
- Employees

