InfoTeam Den Store Teknikkdagen, 25 Januari 2024

Robotic Process Automation (RPA)

… and more

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25 Januari 2024

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Agenda

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Tips

There are a lot of sites with good information. Let us look at four sites.

02

Enterprise Automation

What is Infor Enterprise Automation?

03

RPA Overview

A brief overview of Robotic Process Automation (RPA).

04

RPA Examples

Let us look at a few RPA examples.

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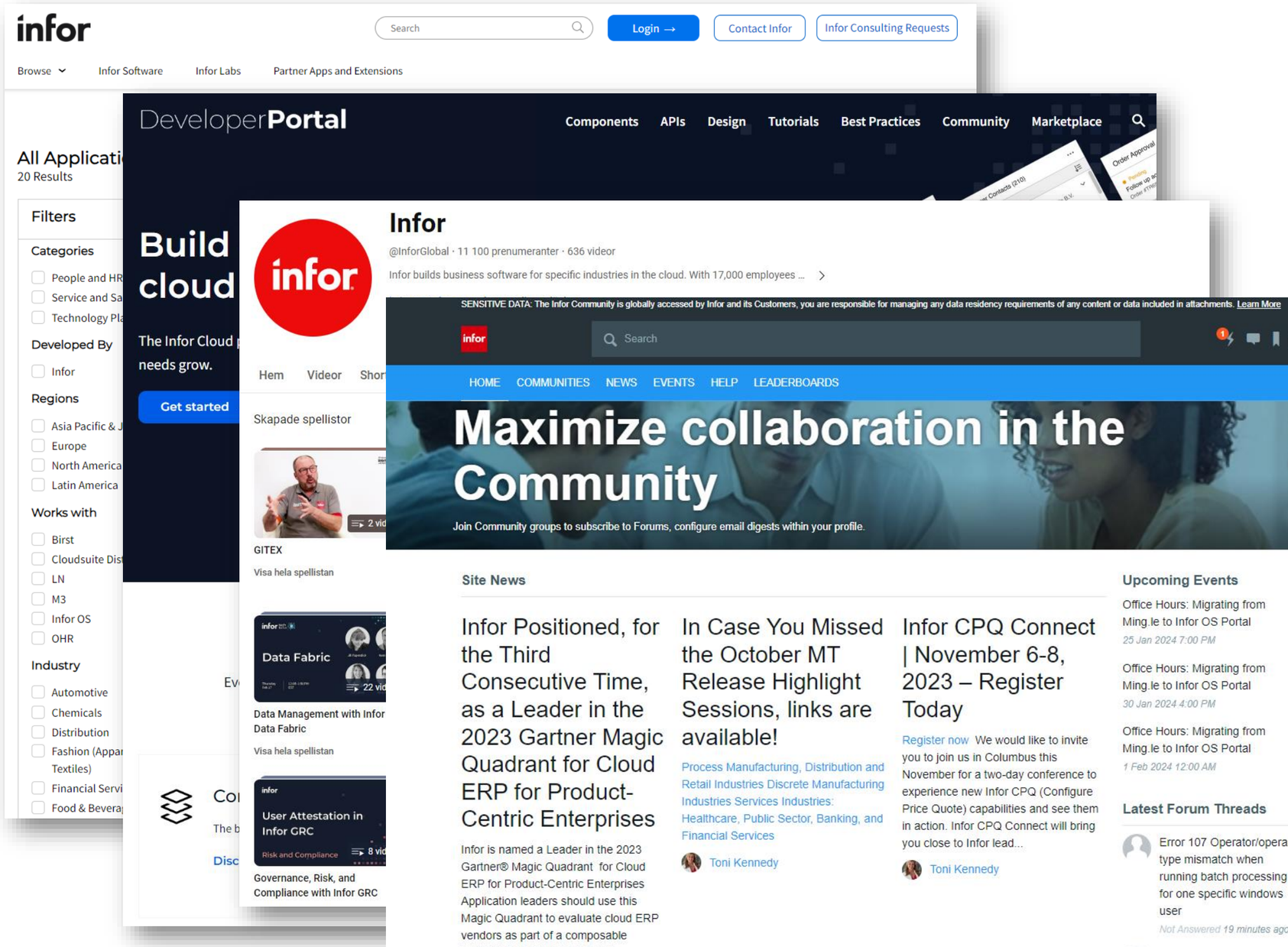
Three good sites…

- Infor Marketplace
- Developers Portal
- Youtube.com
- Infor Community



Infor OS

Infor Operating Services (OS) seamlessly connects services to provide a robust integration framework so customers can be flexible and agile in the cloud

Connect & exchange data

Discover new insights

Automate & control processes

New innovative capabilities

- Security
- User Experience
- Document Management
- Enterprise application integration
- Workflow Automation
- Extensibility
- Data fabric
- Machine Learning
- Enterprise Automation

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Accelerating innovation for
Your Enterprise

- Connect your entire ecosystem
- Contextualize your business data
- Empower your business for rapid innovation

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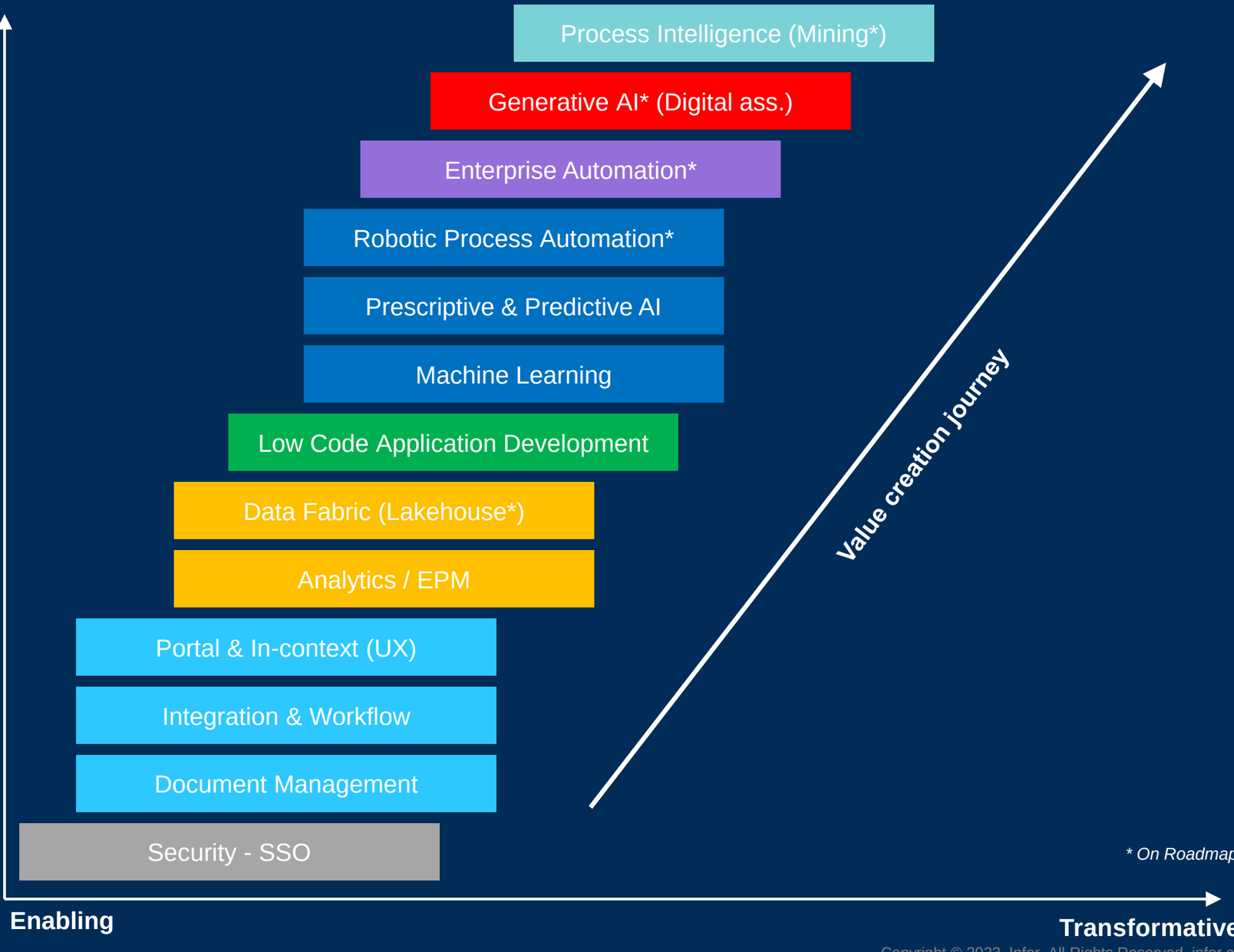
Next-gen Infor Technology Platform
- Intelligent apps
- Predictive workflows
- Automated experiences
- Creative enablement



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Not GA yet!

What is Enterprise Automation?

Enterprise Automation (aka hyperautomation) is the concept of automating everything in an organisation that can be automated without human intervention.

Enterprise Automation involves the **orchestrated** use of **multiple technologies**, tools or platforms, including Artificial Intelligence (AI), Machine Learning, event-driven software architecture, Business Process Management (BPM), Integration Platform as a Service (iPaaS), low-code/no-code tools, packaged software, Robotic Process Automation (RPA), and other types of decision, process and task automation tools.

The outcome is to automate processes and tasks to help **organisations improve efficiency and accuracy**, speed up processes, and free up employees to focus on more strategic work.

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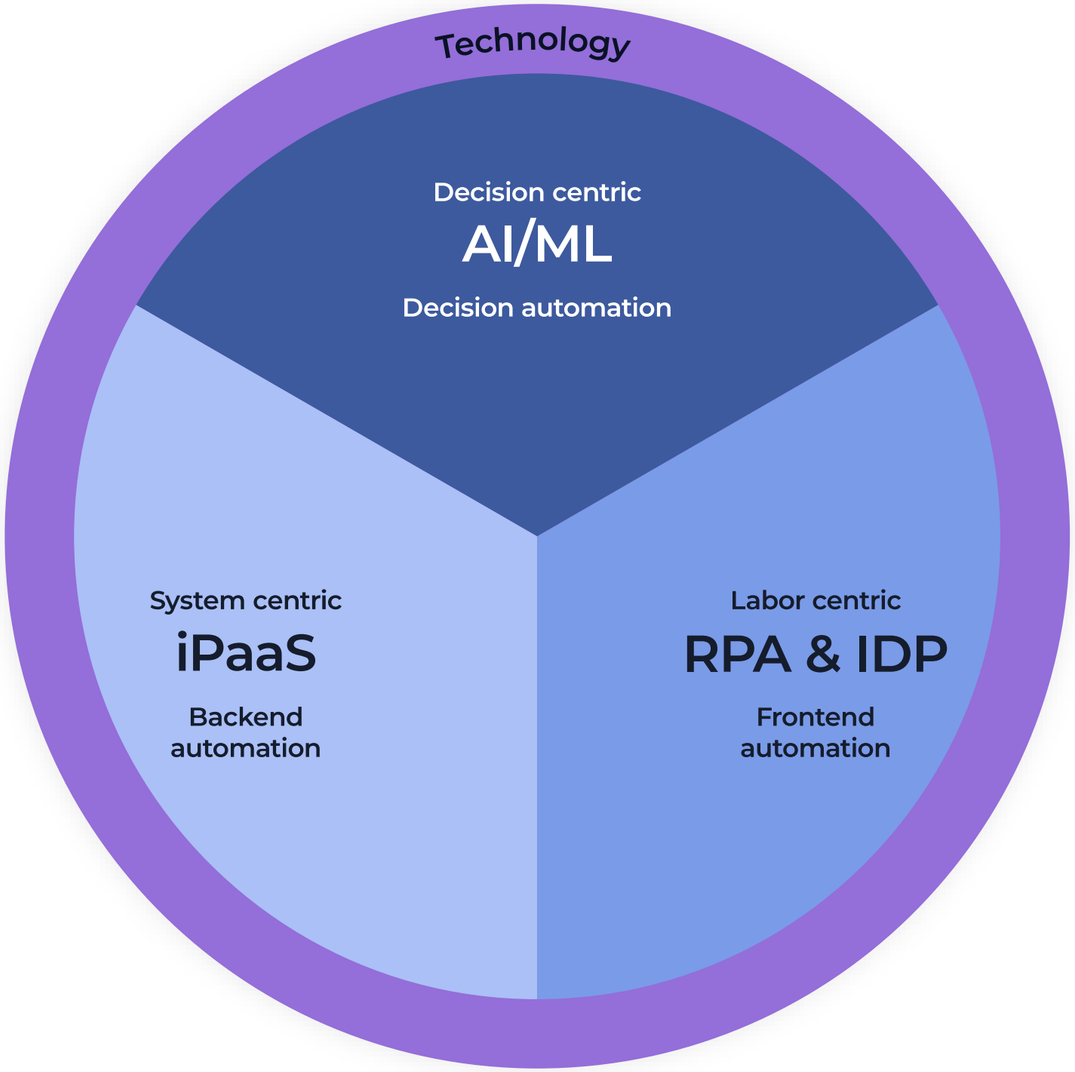
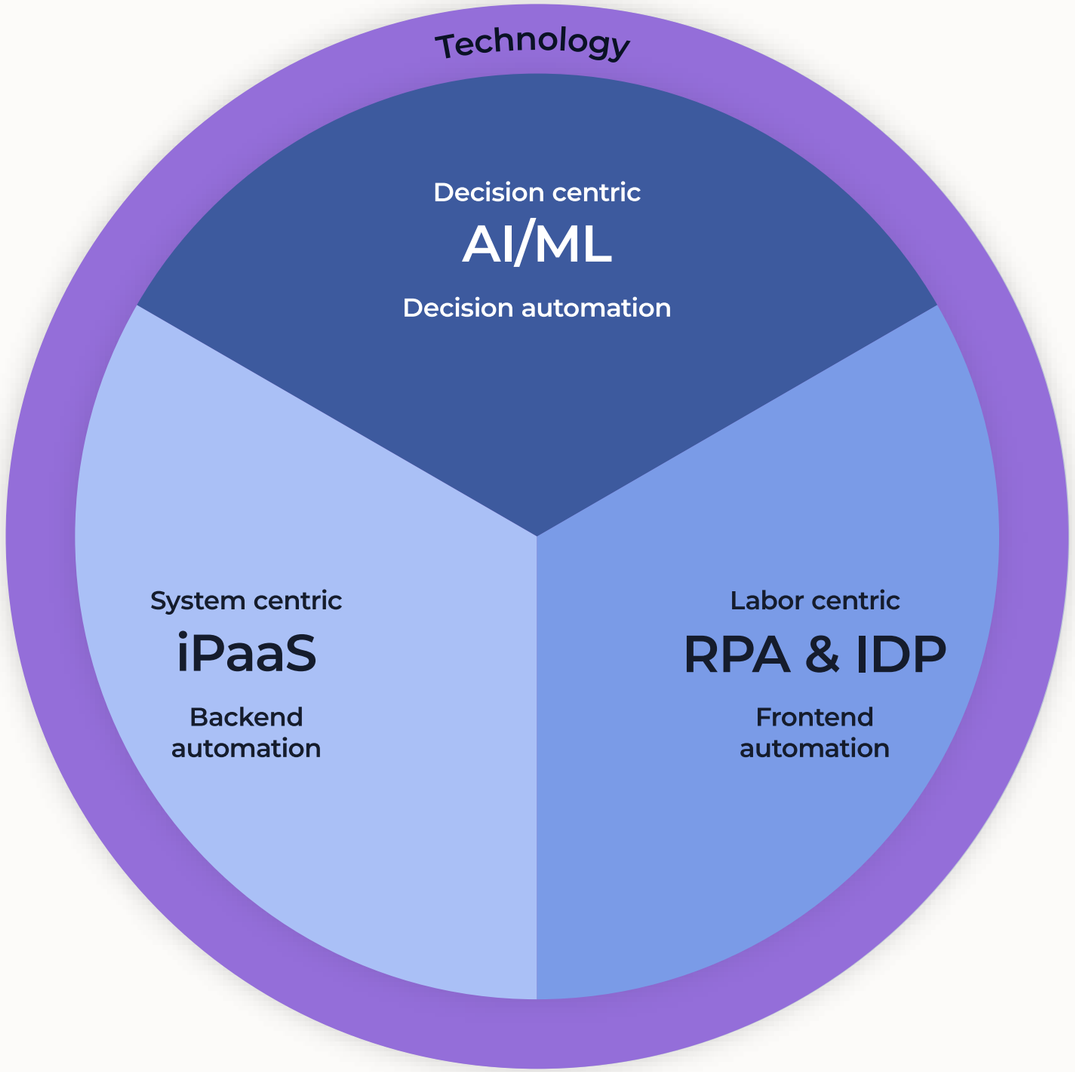
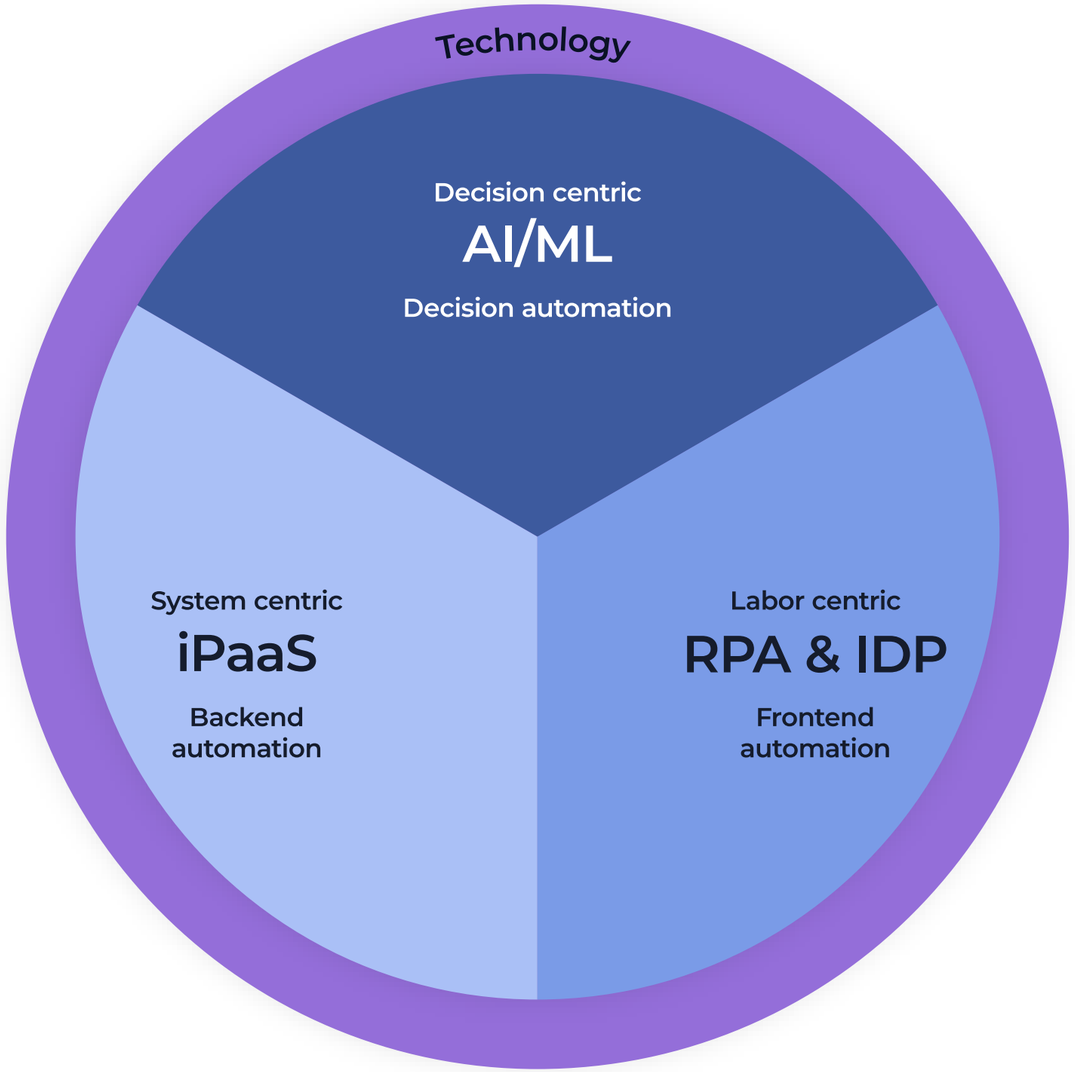
Enterprise Automation



Enterprise Automation





Content Library *(Process)*

Invoice Processing

Proof of Delivery

Compliance Checklist

Customer Creation Workflow

Persona Based Workspaces

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Robotic Process Automation

Infor RPA is a software solution, enabling organizations to **automate repetitive, high-volume/low-value and error-prone tasks** by using software robots or “BOTs“ – tasks otherwise performed by employees in their workstations.

- BOTs **mimic human actions** to **interact with applications, systems, and data sources**
- They perform tasks such as **data entry, extraction, and manipulation**

Infor RPA is part of the Infor OS eco-system and allows smooth integration with

- Infor CloudSuites
- **3rd party applications,** either through APIs or by “screen-scrapping” the user interface

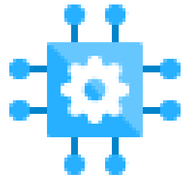
RPA modes of execution

Attended

User Initiated, On-Demand execution

Supervised by the User during execution

Initiated from RPA Assistant



RPA Flow

Unattended

Job initiated, Schedule driven, Invoked via APIs

Typically, unsupervised during execution.

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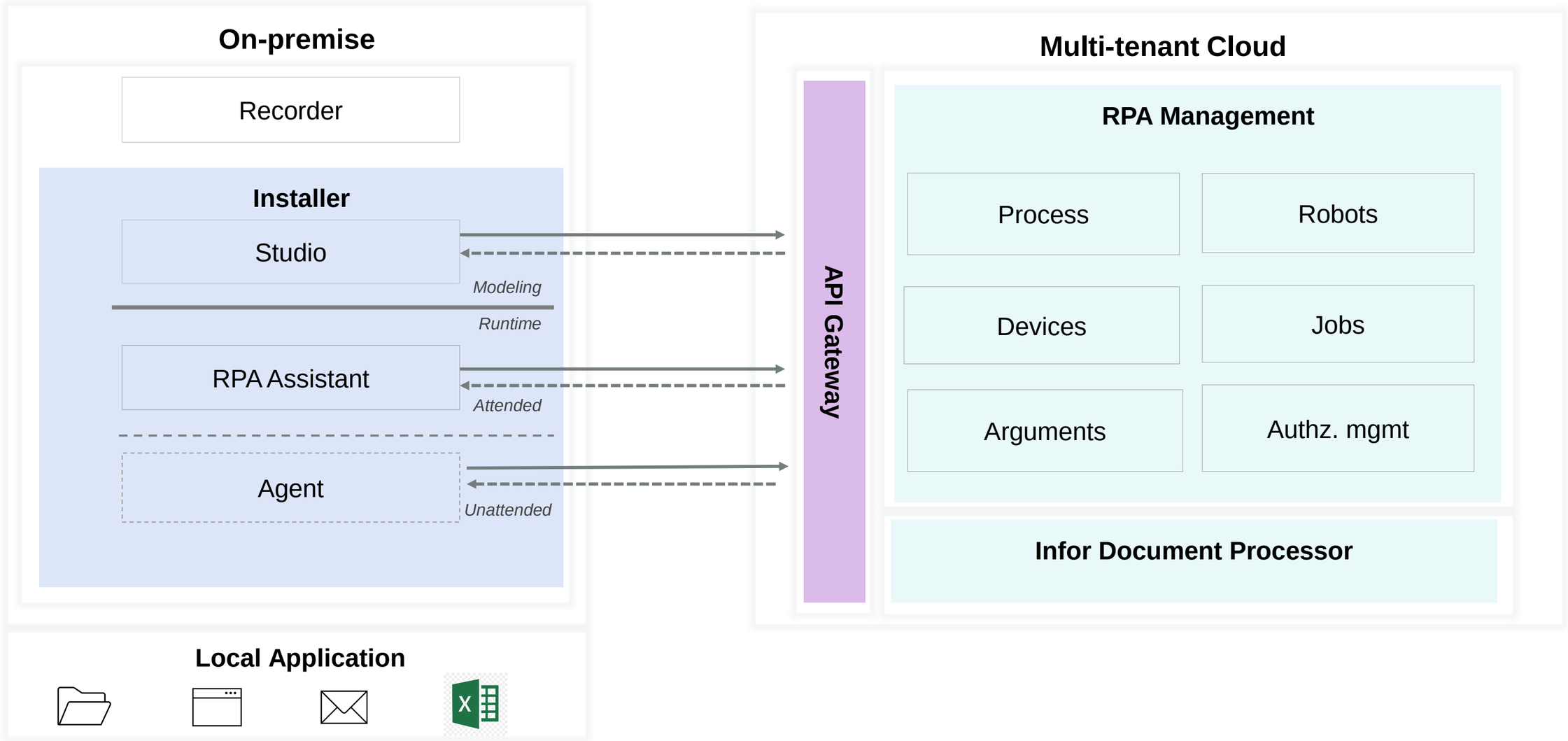
RPA components



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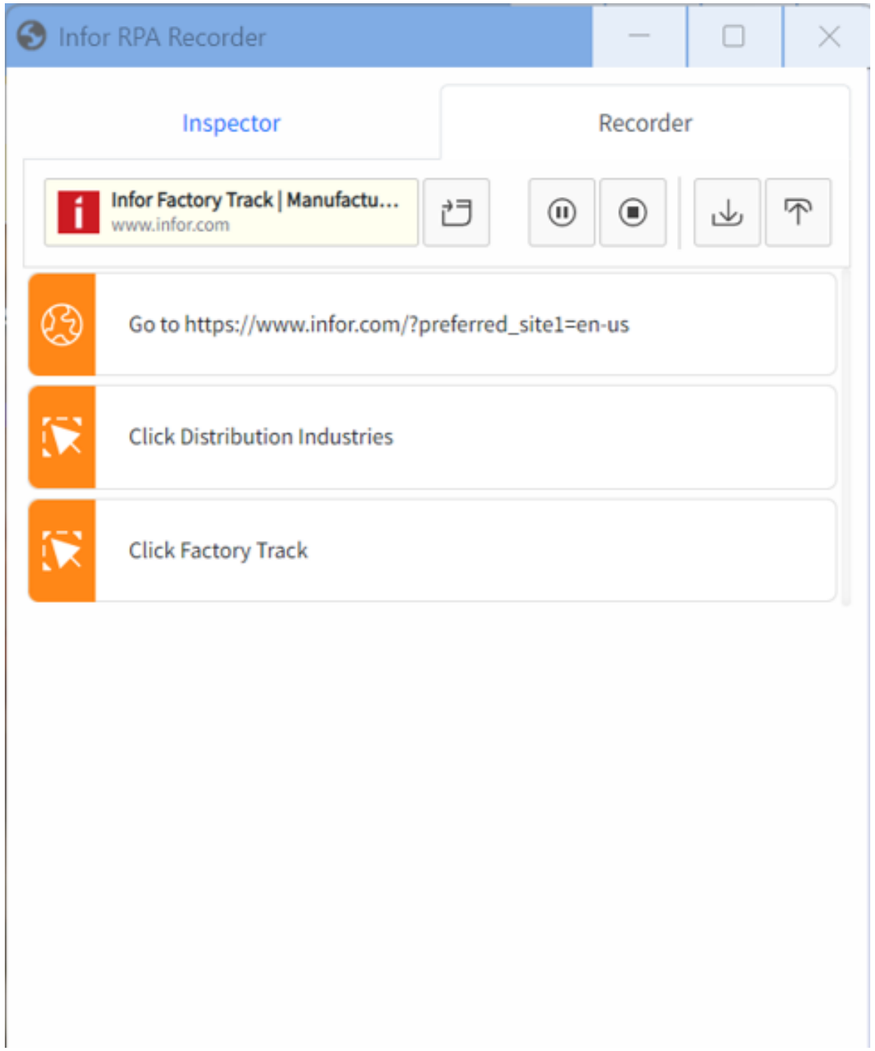
RPA Recorder

Chrome based extension

- Users can **record a set of activities** in the Chrome Browser
- Recorder will generate an RPA flow definition with those activities
- Users can further extend the recorded flow in RPA Recorder and after **importing in RPA Studio**
- Very powerful to get past scenarios where accessing UI controls in the page is difficult



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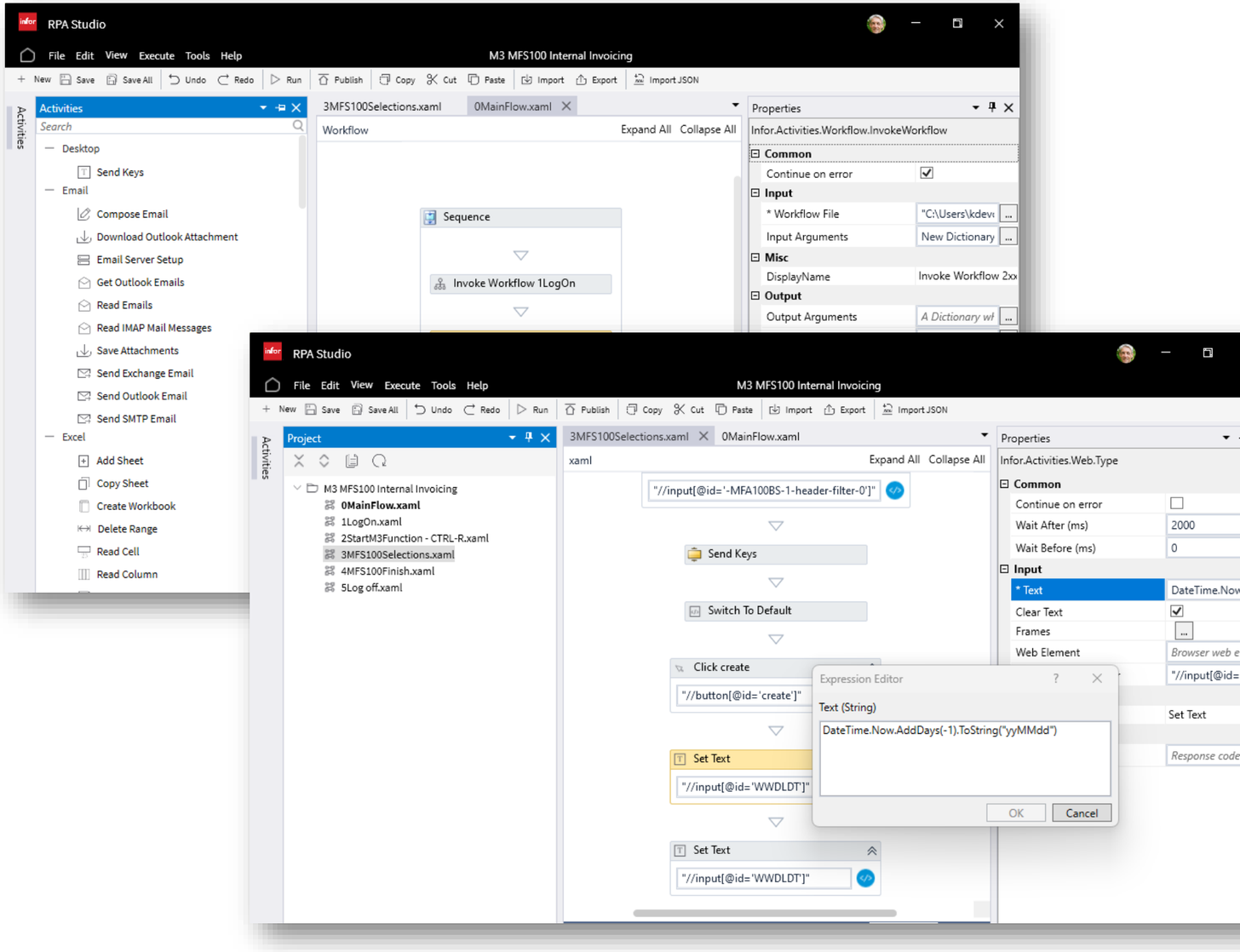
RPA Studio

Rich modeler to define RPA flows

- Based on **Windows Workflow Foundation**.
- Comprehensive set of **Activities**.
- Integrates to the Cloud Tenant via Gateway
- **Sub-flows** that can be added via a **sequence**.
- **Test** mode to run your flow.
- Comes with a separate **Installer** of its own; Windows only



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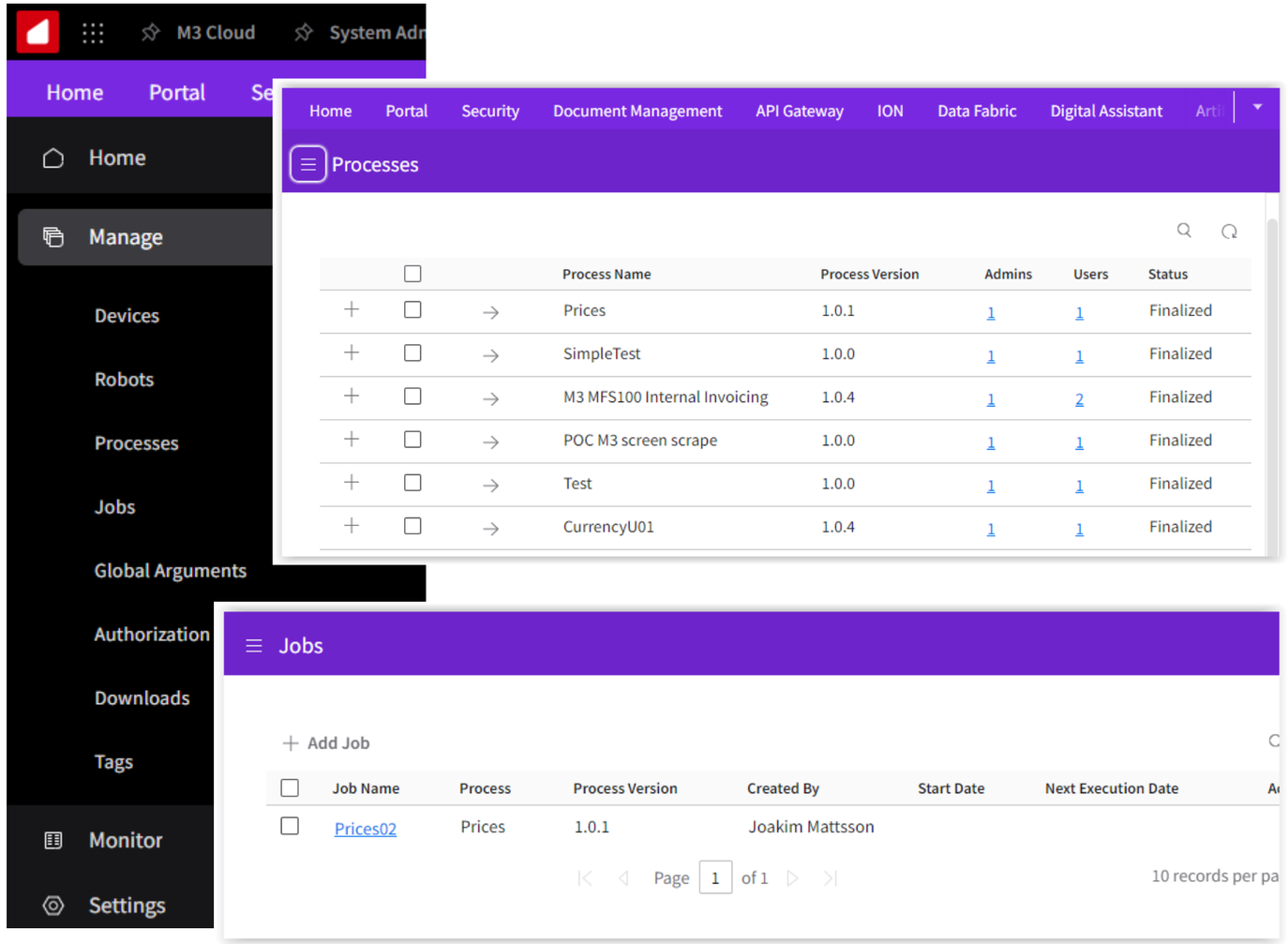
RPA Management

Mastermind UI in MT Infor OS

- “Brain” behind the RPA that manages the execution plan
- **Process** – list of all published RPA flows
- **Jobs** – An execution instance; Its specific to a Process.
  - As part of the Job definition, we need to define which Device, Bot and User context should be used
- **Device** – Physical workstations where the job instances are executed
- **Robots** aka BOTs represent the user session on the device where the job instance will run on
- **Variables** - Global variables with default values that can be referenced in Processes



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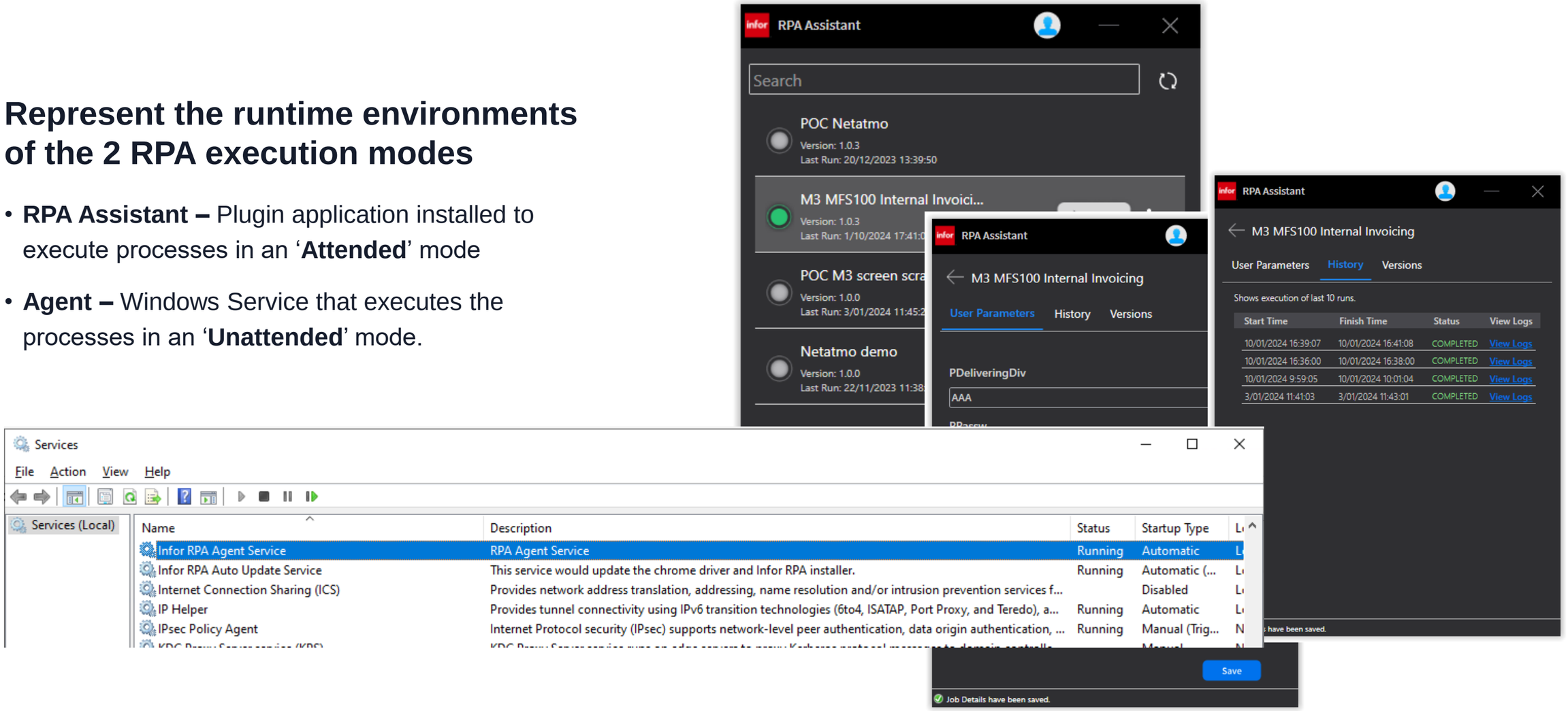
RPA Assistant & Agent

Represent the runtime environments of the 2 RPA execution modes

- **RPA Assistant –** Plugin application installed to execute processes in an '**Attended**' mode
- **Agent –** Windows Service that executes the processes in an '**Unattended**' mode.



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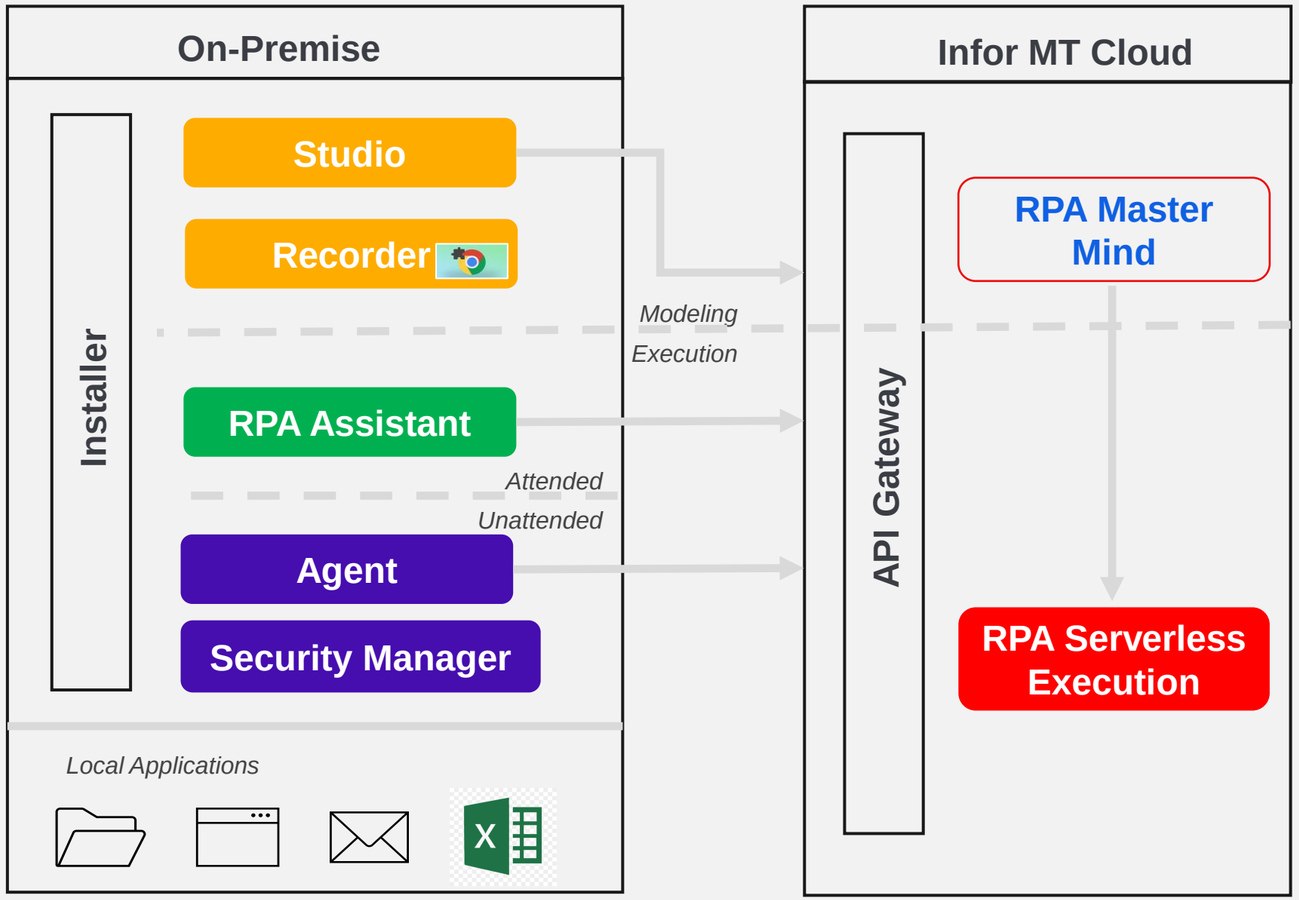
Agentless RPA execution

April 2024
feature release

Execution of the automated processes in the unattended mode by serverless pool of bots without the need of deploying the virtual machine (VM).

Accelerate your cloud adoption with industry-specific embedded business processes



No Service Management

Lower TCO. Eliminates the need for VM configuration and infrastructure management

Concurrent executions

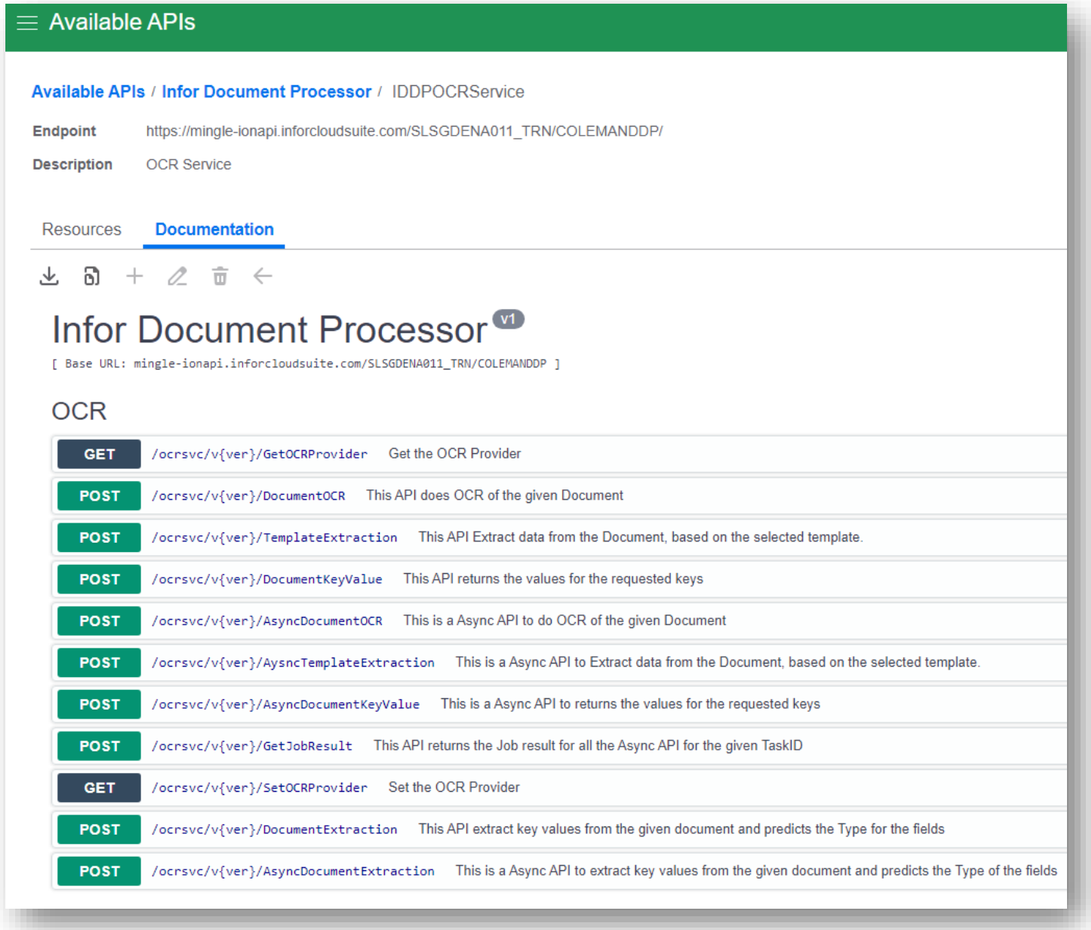
Enables parallel execution of multiple jobs

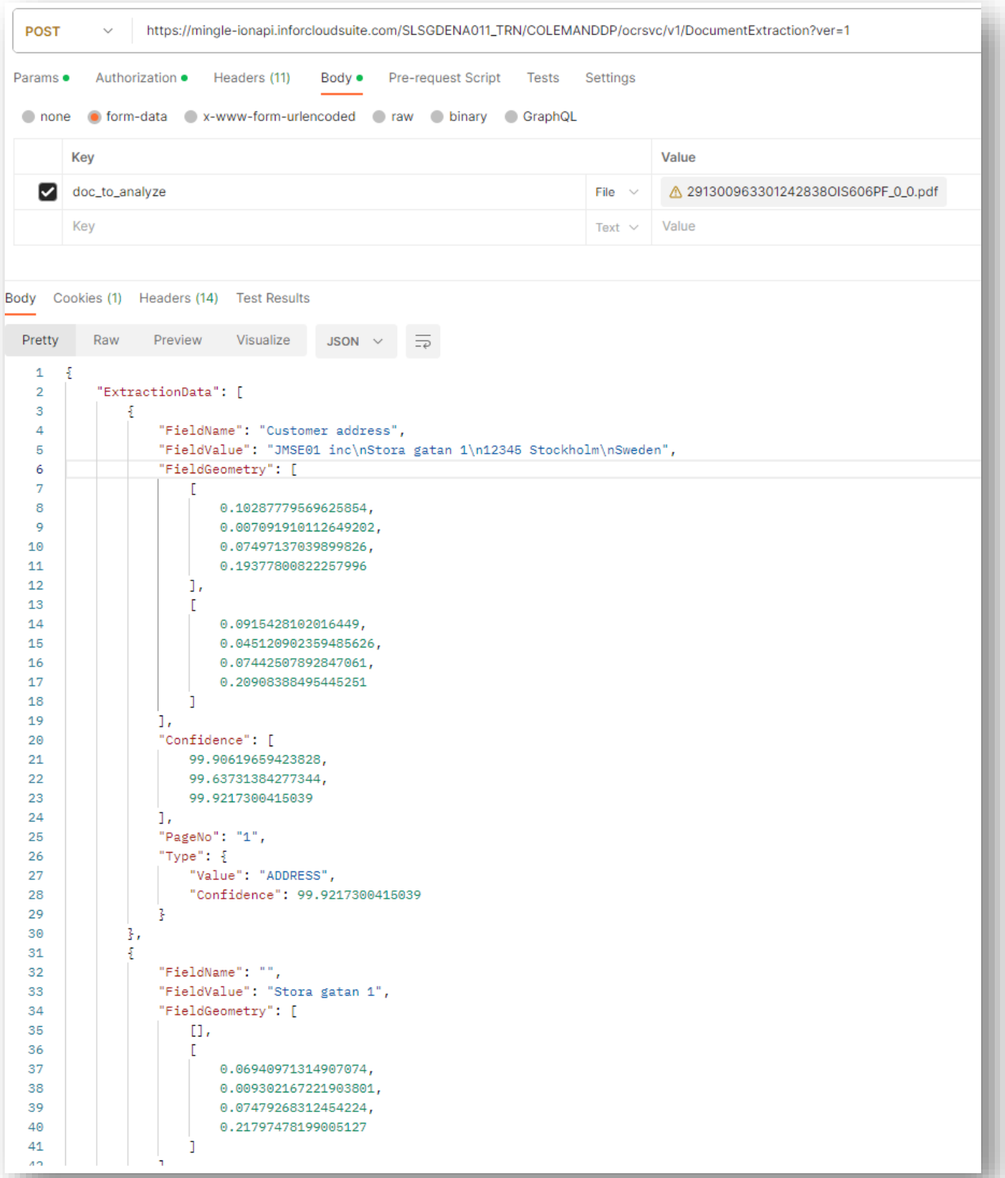
Administration tool

Administration and management though the RPA Management

Not GA yet!

Infor Document Processor





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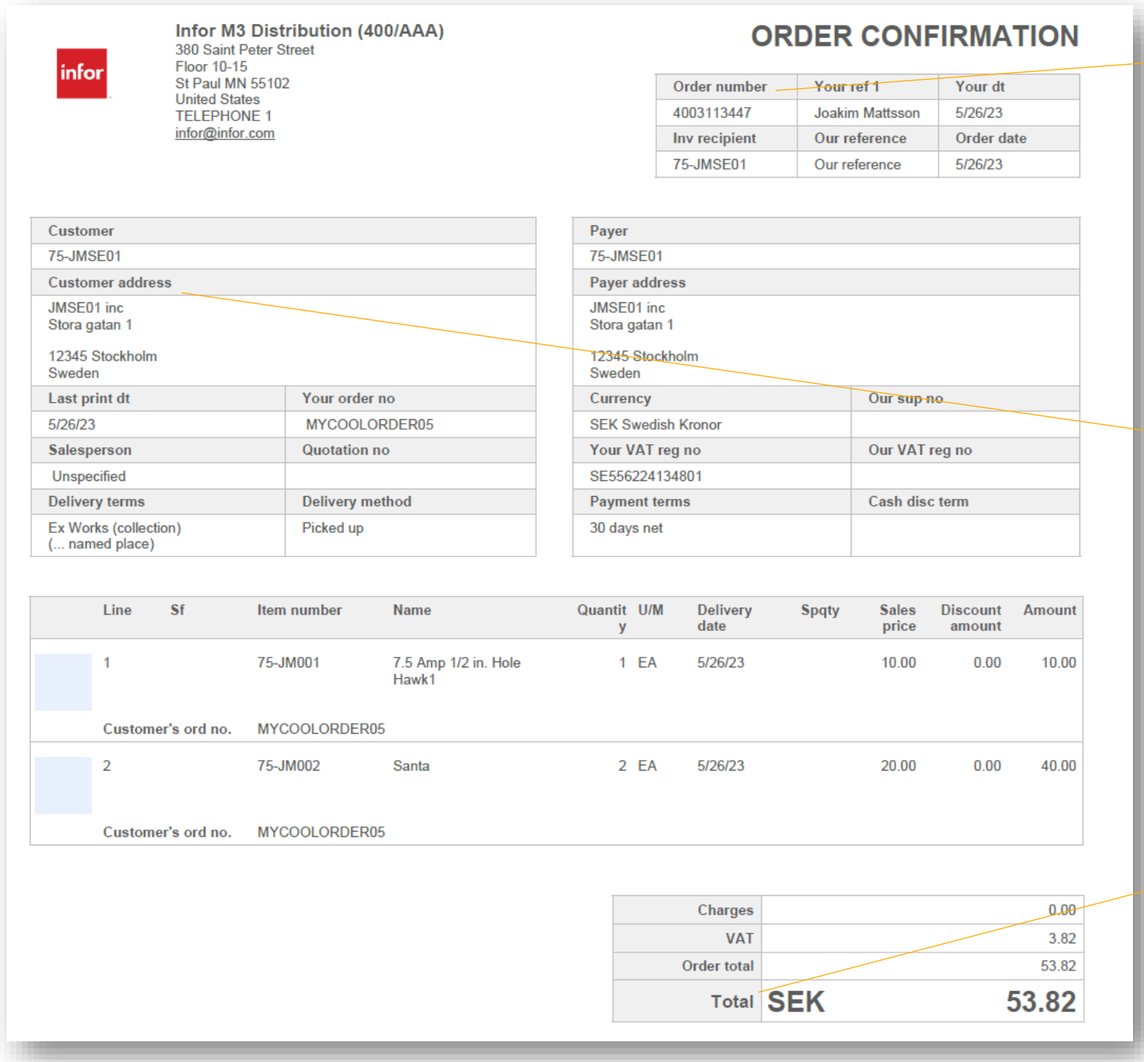
PDF extraction output



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St Paul MN 55102
United States
TELEPHONE 1
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ORDER CONFIRMATION

Order number	Your ref 1	Your dt
4003113447	Joakim Mattsson	5/26/23
Inv recipient	Our reference	Order date
75-JMSE01	Our reference	5/26/23

Customer	
75-JMSE01	
Customer address	
JMSE01 inc Stora gatan 1 12345 Stockholm Sweden	
Last print dt	Your order no
5/26/23	MYCOOLORDER05
Salesperson	Quotation no
Unspecified	
Delivery terms	Delivery method
Ex Works (collection) (... named place)	Picked up

Payer	
75-JMSE01	
Payer address	
JMSE01 inc Stora gatan 1 12345 Stockholm Sweden	
Currency	Our sup no
SEK Swedish Kronor	
Your VAT reg no	Our VAT reg no
SE556224134801	
Payment terms	Cash disc term
30 days net	

	Line	Sf	Item number	Name	Quantity	U/M	Delivery date	Spqty	Sales price	Discount amount	Amount
	1		75-JM001	7.5 Amp 1/2 in. Hole Hawk1	1	EA	5/26/23		10.00	0.00	10.00
	Customer's ord no.		MYCOOLORDER05								
	2		75-JM002	Santa	2	EA	5/26/23		20.00	0.00	40.00
	Customer's ord no.		MYCOOLORDER05								

Charges	0.00
VAT	3.82
Order total	53.82
Total SEK	53.82


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    "Value": "INVOICE_RECEIPT_ID"
}
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}
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    "Value": "TOTAL"
}
```


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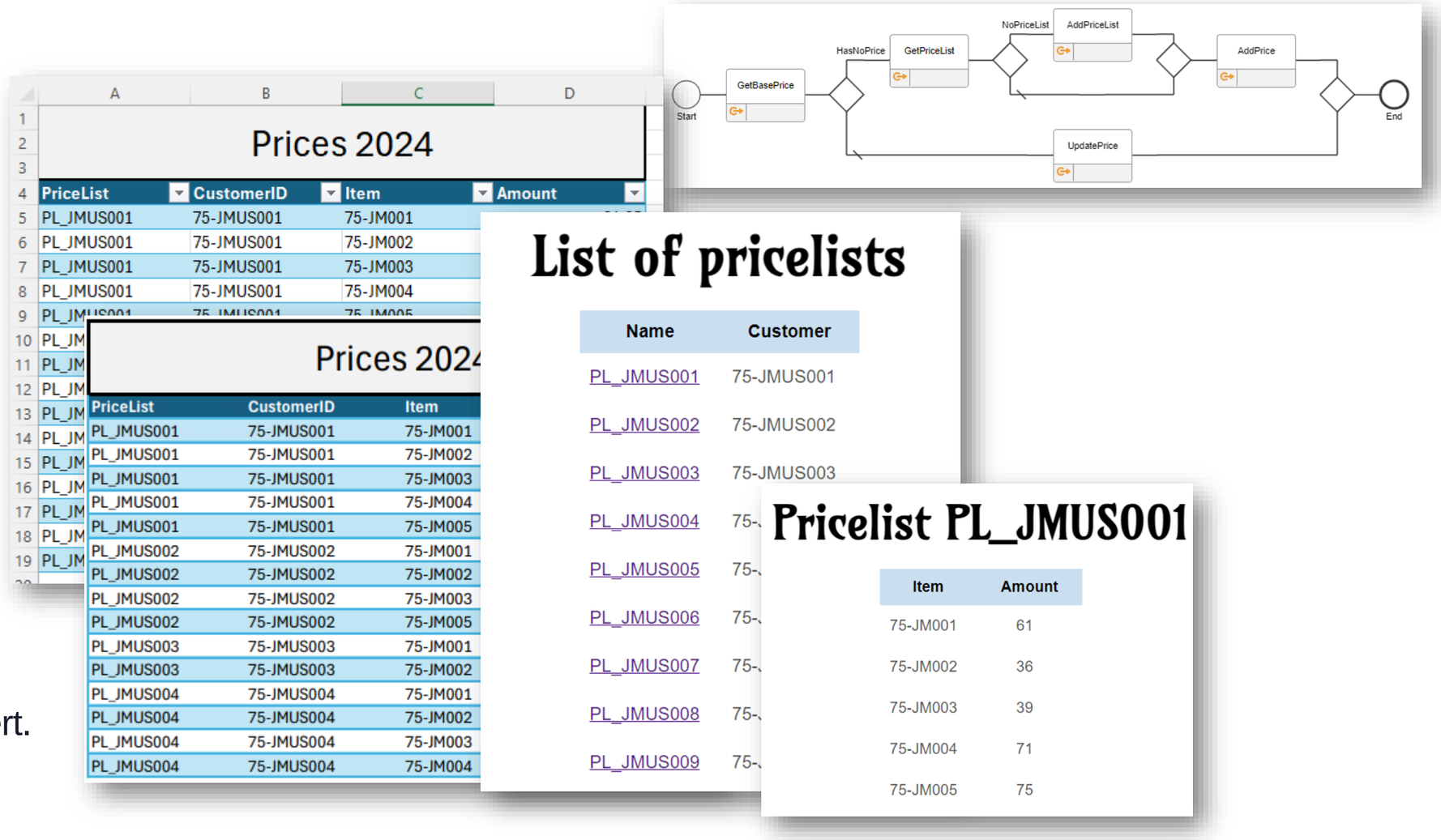
RPA Scenario 1 – Update pricelists

- Update from Excel
  - From mail
- Update from PDF
  - From folder
  - Uses IDP
- Update from Web
  - Unattended

Uses an API flow for pricelist upsert.



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