

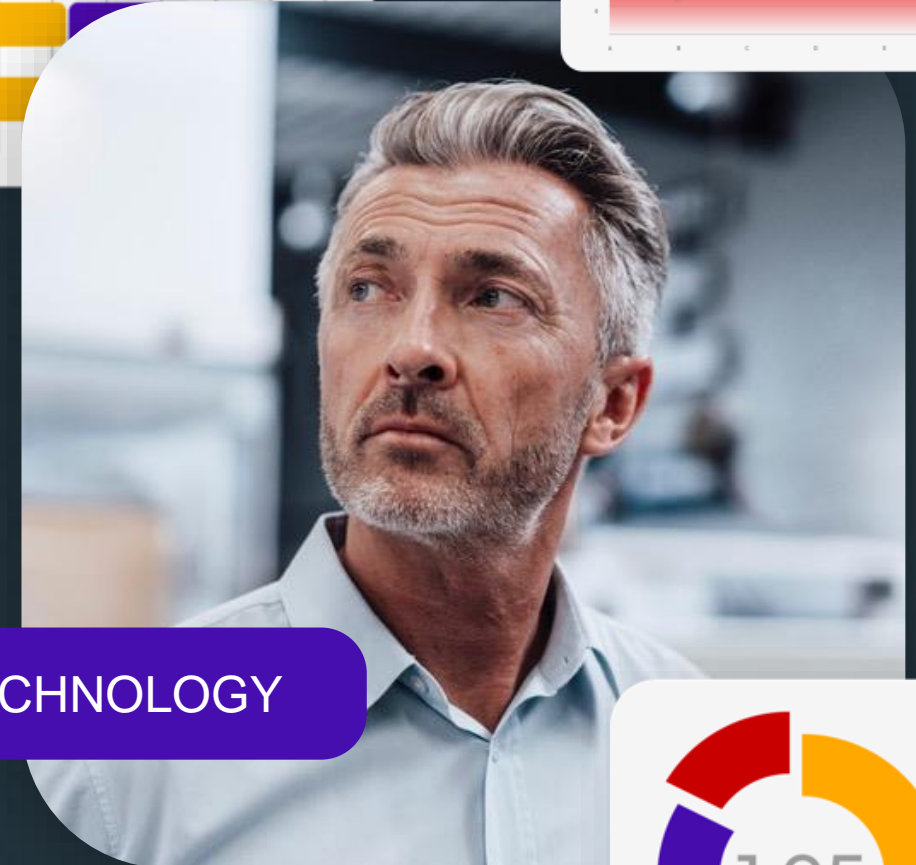
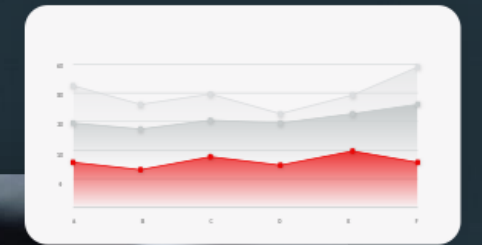


Robotic Process Automation

# Enterprise Automation

Joakim Mattsson, Infor

2024.03



TECHNOLOGY



# Disclaimer

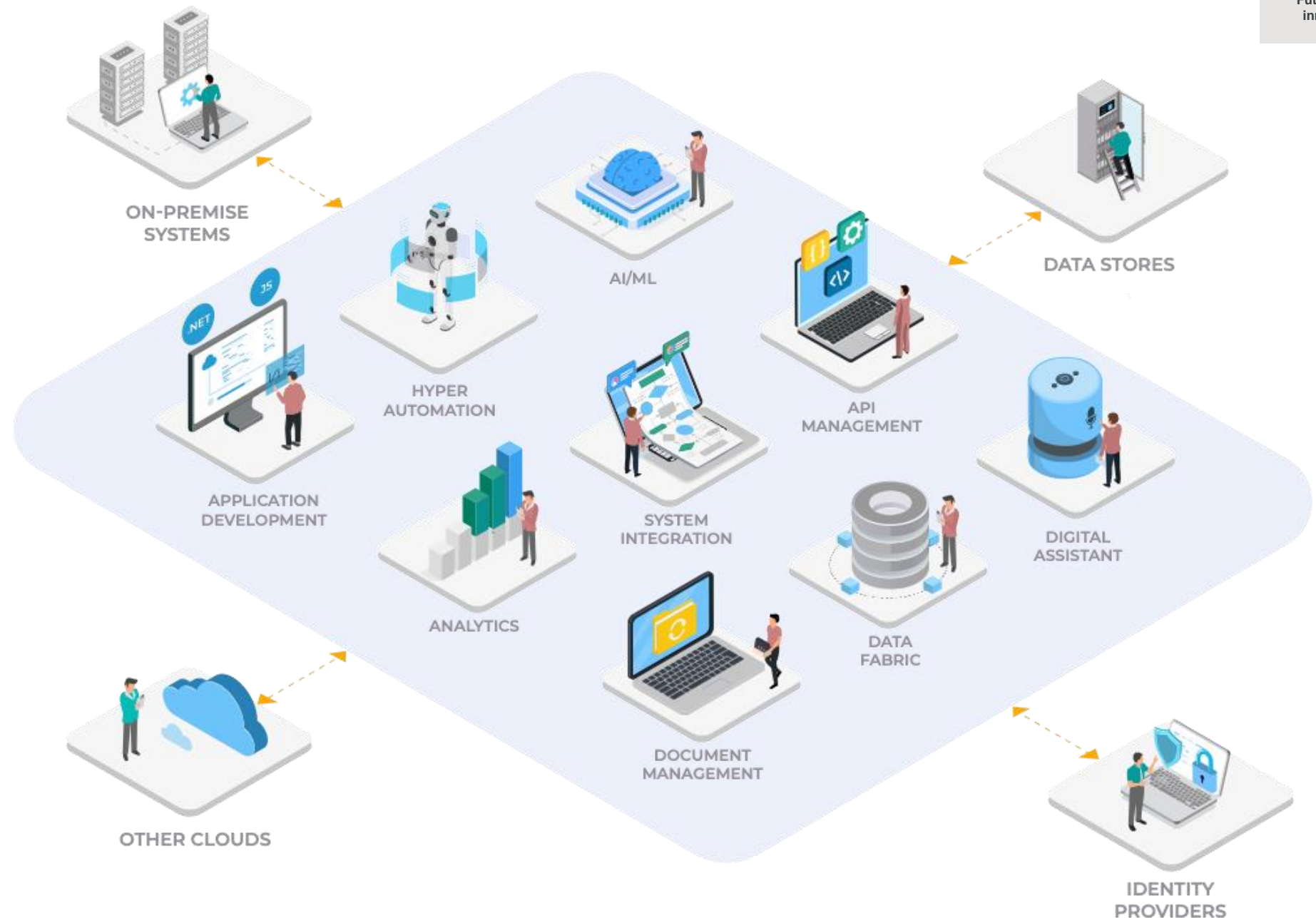
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# An open architecture

Infor **OS**

- Connect data from anything to anywhere
- Automate tasks across any applications
- Easily create apps for your unique needs
- Direct access to all your data for AI
- Ability to analyze, visualize and act on data



It's all there, pre-integrated and ready to use

# An open architecture



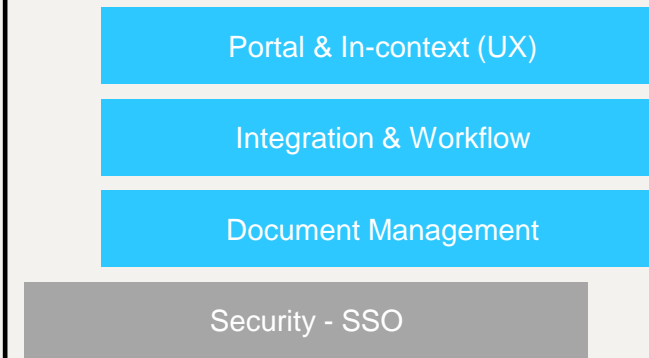
It's all there, pre-integrated and ready to use

Personalised

Standard



Enabling



Transformative

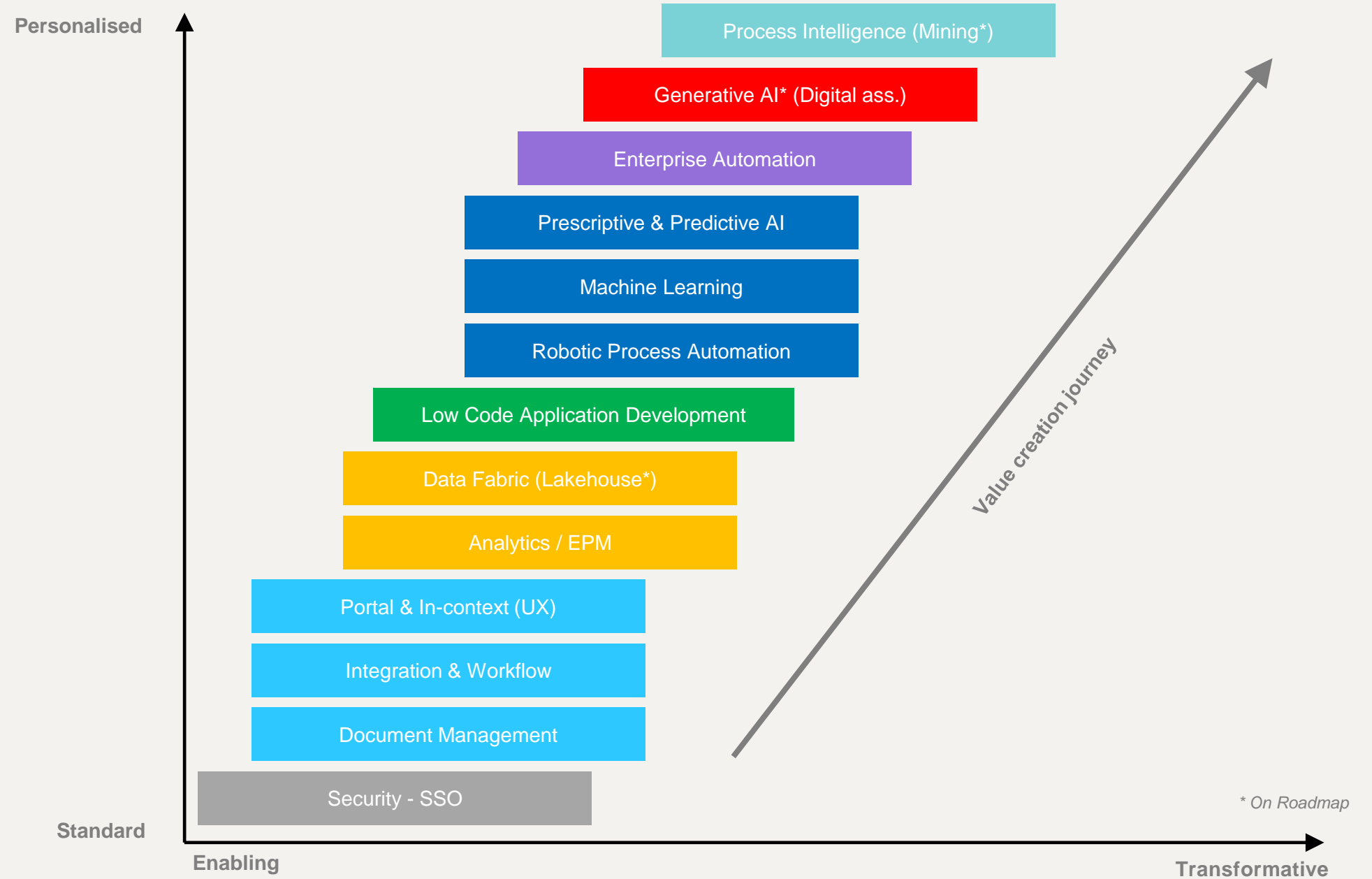


\* On Roadmap

# An open architecture



It's all there, pre-integrated and ready to use



# Automation

Solution overview

# Integration

# integration Platform as a Service



## ION ESB – Messaging

Asynchronous

Publish – Subscribe

Event Driven

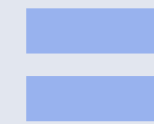


## ION API Gateway

Synchronous

Point to Point

Client initiated



## iPasS Experience

iPaaS = ION API Gateway + ION ESB

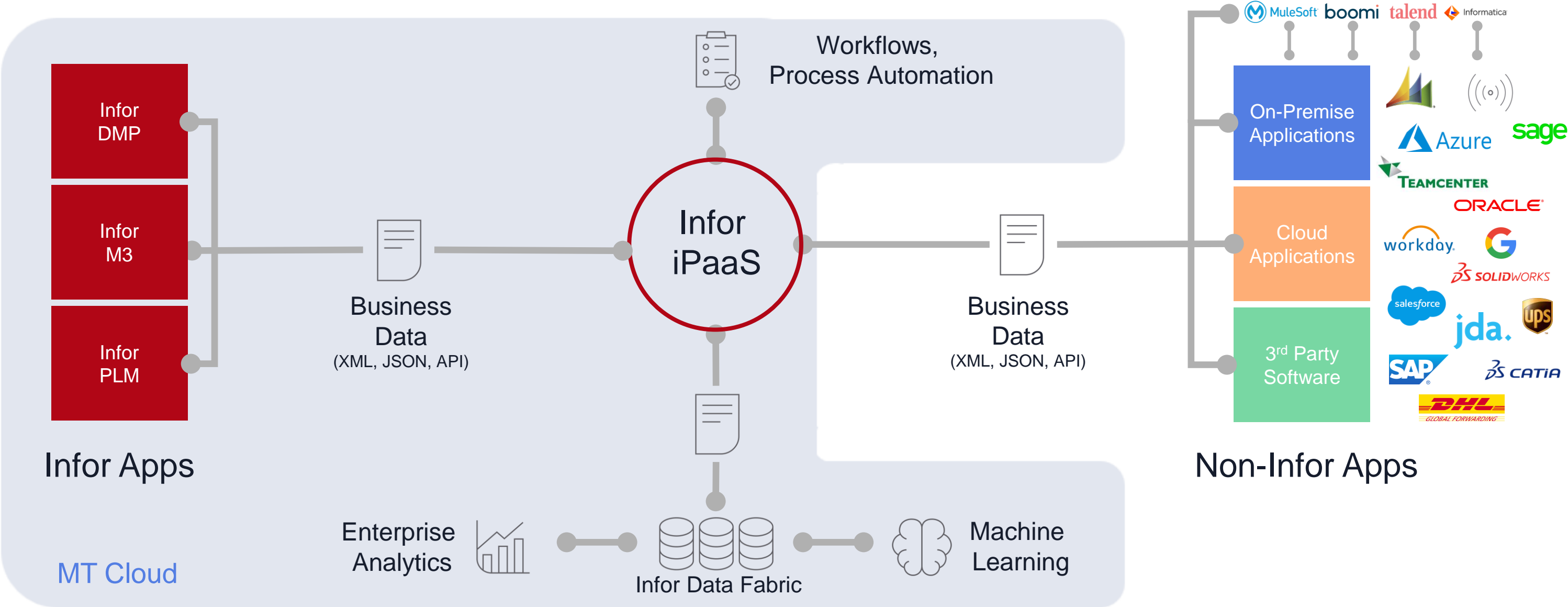
Blend of Sync & Async patterns

Highly scalable



# Integration architecture

Standards based • Loosely coupled • Event driven • Enterprise Service Bus

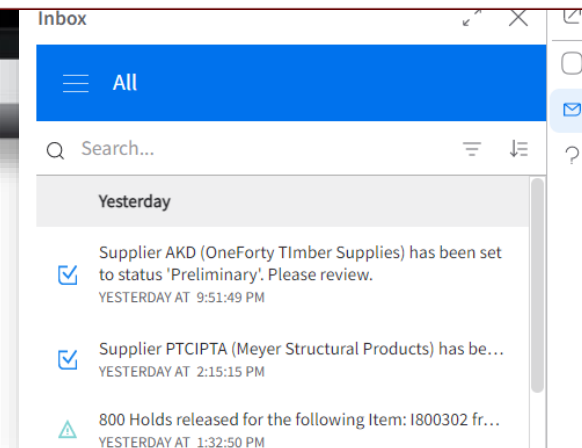
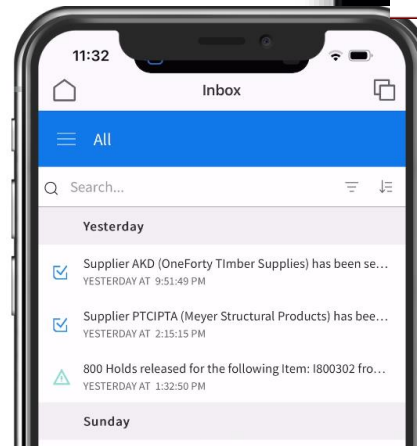
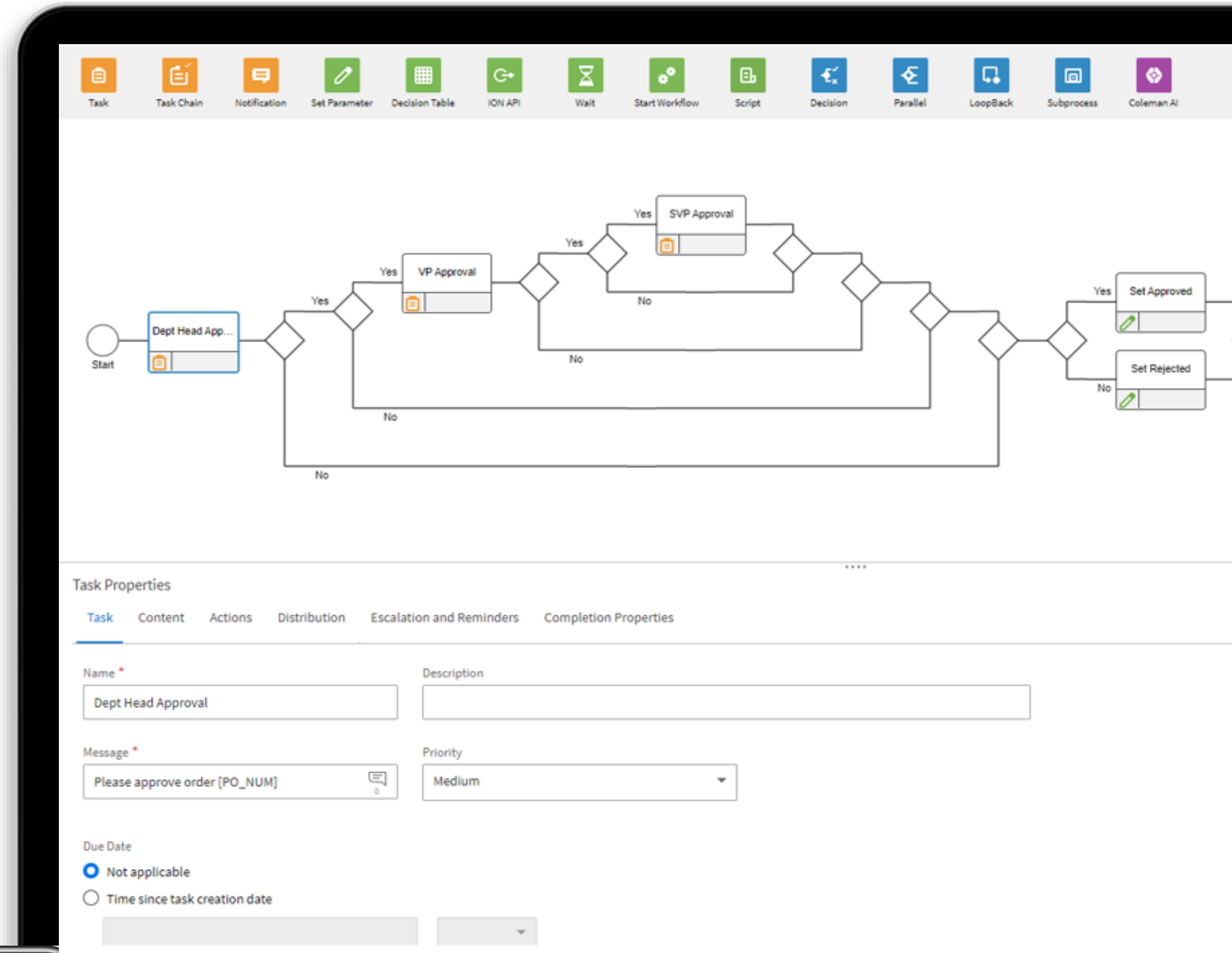


Solution overview

# Process Automation

# Process Automation – Workflows

- Drag and drop visual BPMN modeler
  - Uses a graphical modeller to create an easy to view diagram
- System as well as human interaction
- Manage multiple alerts and workflows
  - Activate/de-active individually
  - Update active alerts & workflows on the fly
  - Decision and approval matrixes
- Triggers:
  - Standard & custom events, APIs, manual, and scheduled
- Alerts and tasks via the Employee Portal, Mobile App, or Email
  - Escalate if not assigned, completed or acknowledged



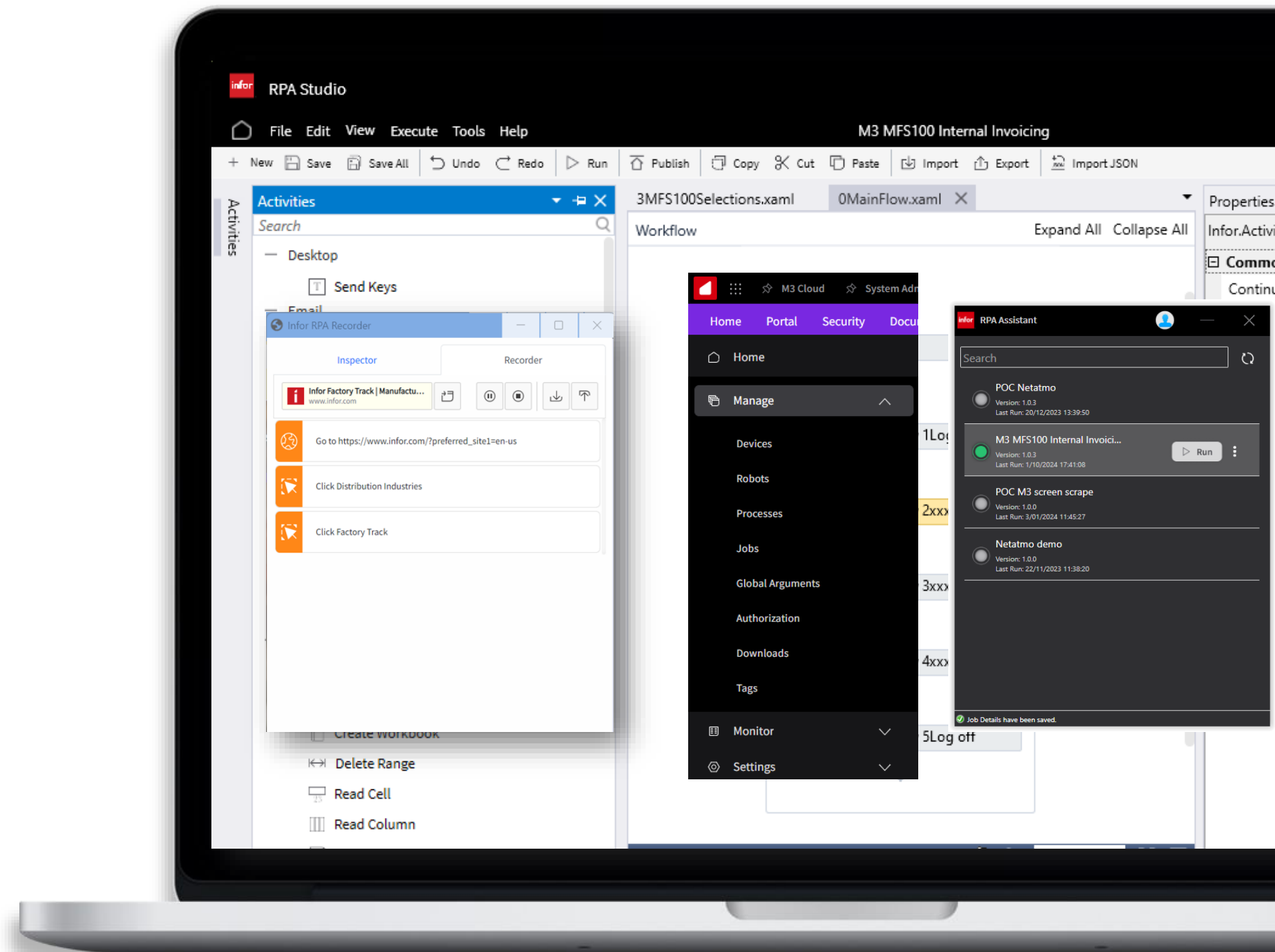
Solution overview

# Robotic Process Automation

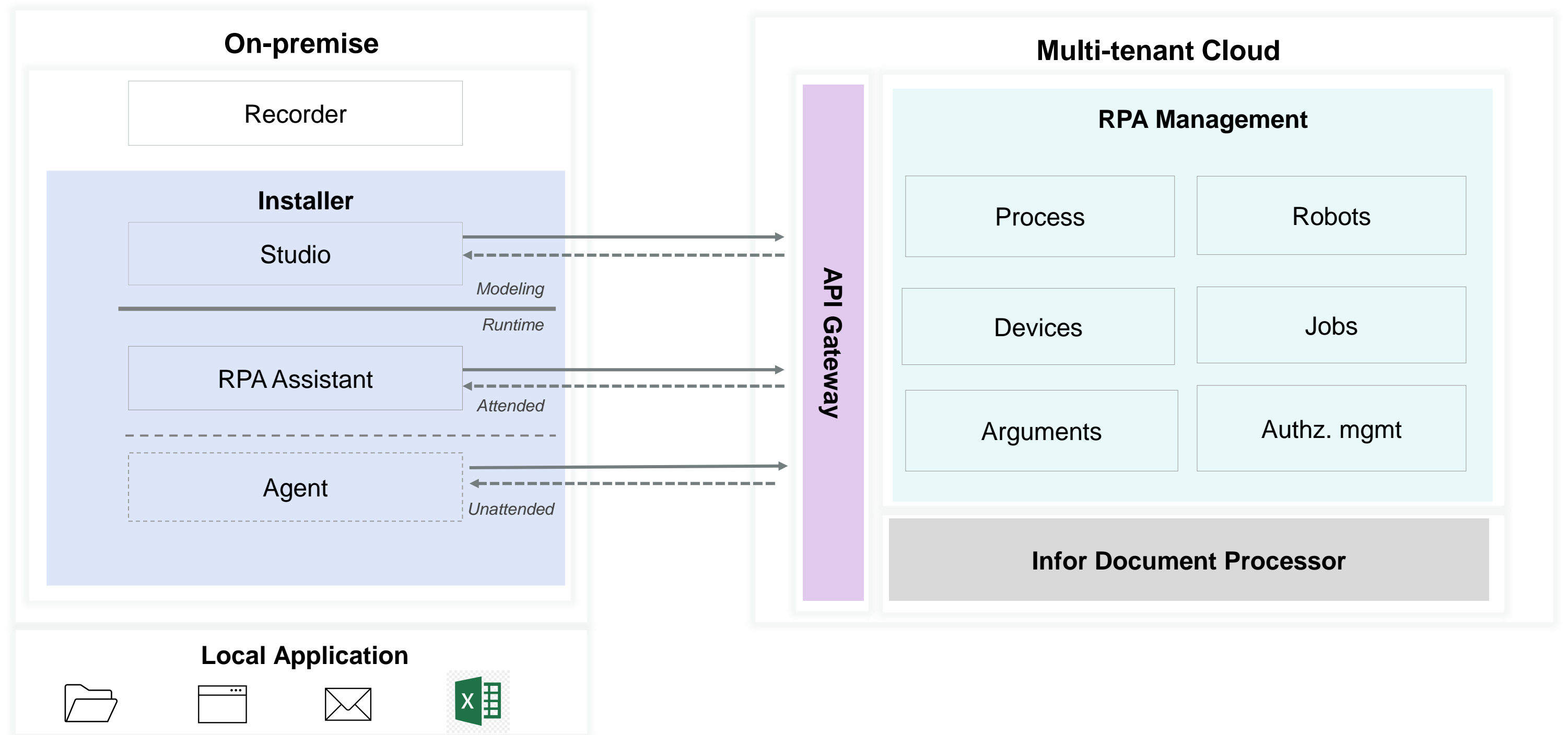
# Robotic Process Automation (RPA)

Robotic Process Automation (RPA) uses software robots or "bots" to automate repetitive tasks and processes in your organization to save time and reduce errors. You can apply RPA to rule-based processes to help reduce low-value workloads.

- Significant cost savings
- Speed and efficiency
- Compliance and accuracy
- Legacy modernization
- Cost effective digitization process



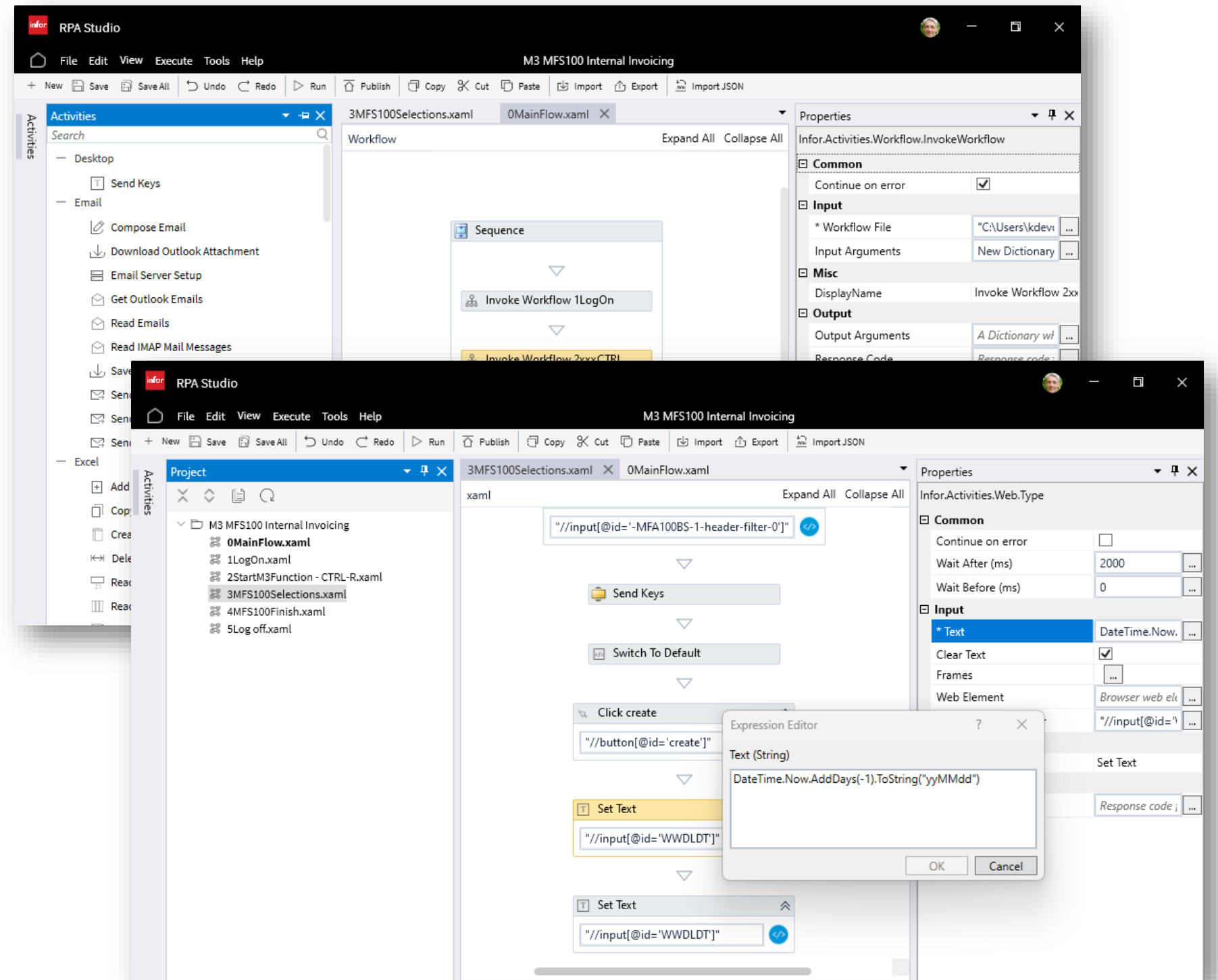
# Components



# 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

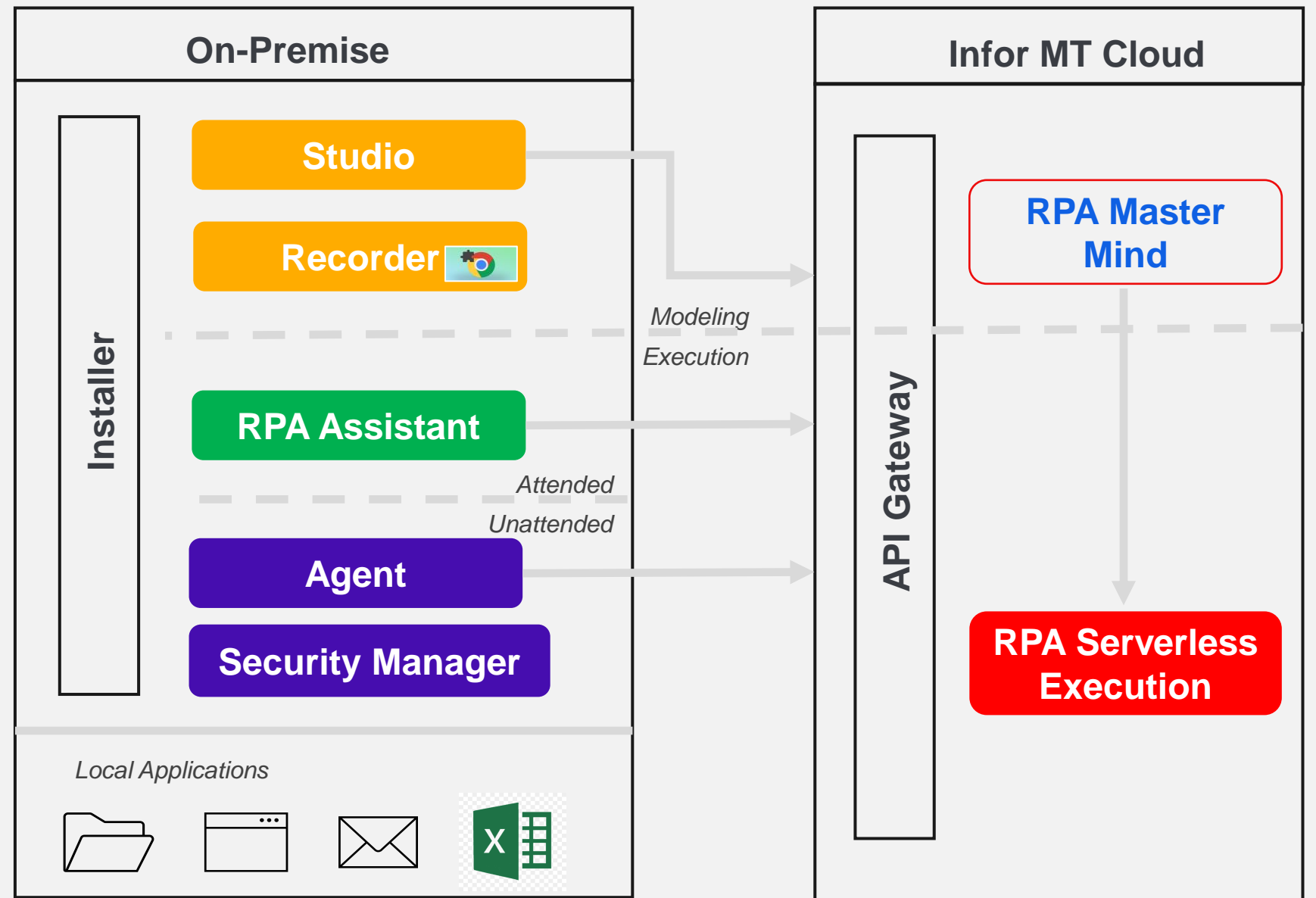


# Agentless RPA execution

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

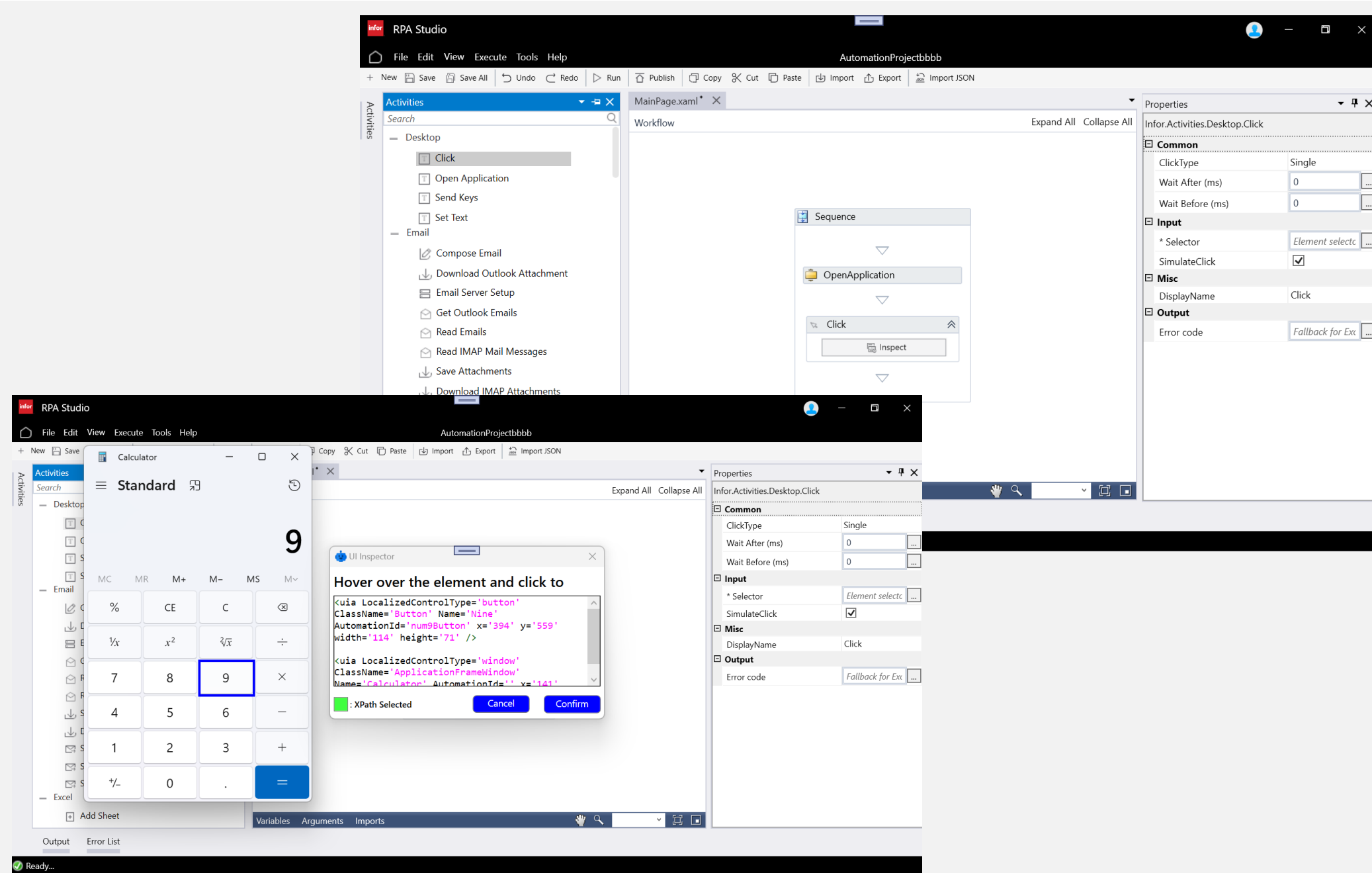
Administration and management through the RPA Management



# Desktop app automation

April 2024  
feature release

Desktop automation in RPA streamlines repetitive tasks by employing software robots to mimic human interactions with a computer's desktop environment.



## Desktop app task automation

Automating tasks such as application navigation, data entry and more in desk application

## Legacy systems support

Task automation in legacy systems which don't speak APIs

## Recorder & Inspector

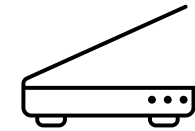
Allows users to record automation steps by interacting with the application in a manner similar to manual operation

# Infor Document Processor\*

OCR and More..

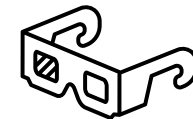
## A Complete Document Digitization Platform

Inhouse solution that provides pre and post extraction services, Extraction and analysis of text



### Text Extraction

- Key-Value Pair extraction
- Region of interest/ Template driven



### Document Analysis

- Processing Tables, Forms
- Pre/ Post enhancement of content
- Support for PDF and images



### AI/ ML based Extraction

- Ability to make a ML model and train them
- Integrated with Coleman AI
- Support for Opensource algorithms

# PDF extraction output

**infor** Infor M3 Distribution (400/AAA)  
 380 Saint Peter Street  
 Floor 10-15  
 St Paul MN 55102  
 United States  
 TELEPHONE 1  
 infor@infor.com

## 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		Payer	
75-JMSE01		75-JMSE01	
Customer address		Payer address	
JMSE01 inc Stora gatan 1  12345 Stockholm Sweden		JMSE01 inc Stora gatan 1  12345 Stockholm Sweden	
Last print dt	Your order no	Currency	Our sup no
5/26/23	MYCOOLORDER05	SEK Swedish Kronor	
Salesperson	Quotation no	Your VAT reg no	Our VAT reg no
Unspecified		SE556224134801	
Delivery terms	Delivery method	Payment terms	Cash disc term
Ex Works (collection) (... named place)	Picked up	30 days net	

Line	Sf	Item number	Name	Quantit y	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
<b>Total</b>	<b>SEK 53.82</b>

```

"FieldName": "Order number",
"FieldValue": "4003113447",
"PageNo": "1",
>Type": {
  "Confidence": 73.4991683959961,
  "Value": "INVOICE_RECEIPT_ID"
}
  
```

```

"FieldName": "Customer address",
"FieldValue": "JMSE01 inc\nStora gatan 1\n12345 Stockholm\nSweden",
"PageNo": "1",
>Type": {
  "Confidence": 99.9241561889648,
  "Value": "ADDRESS"
}
  
```

```

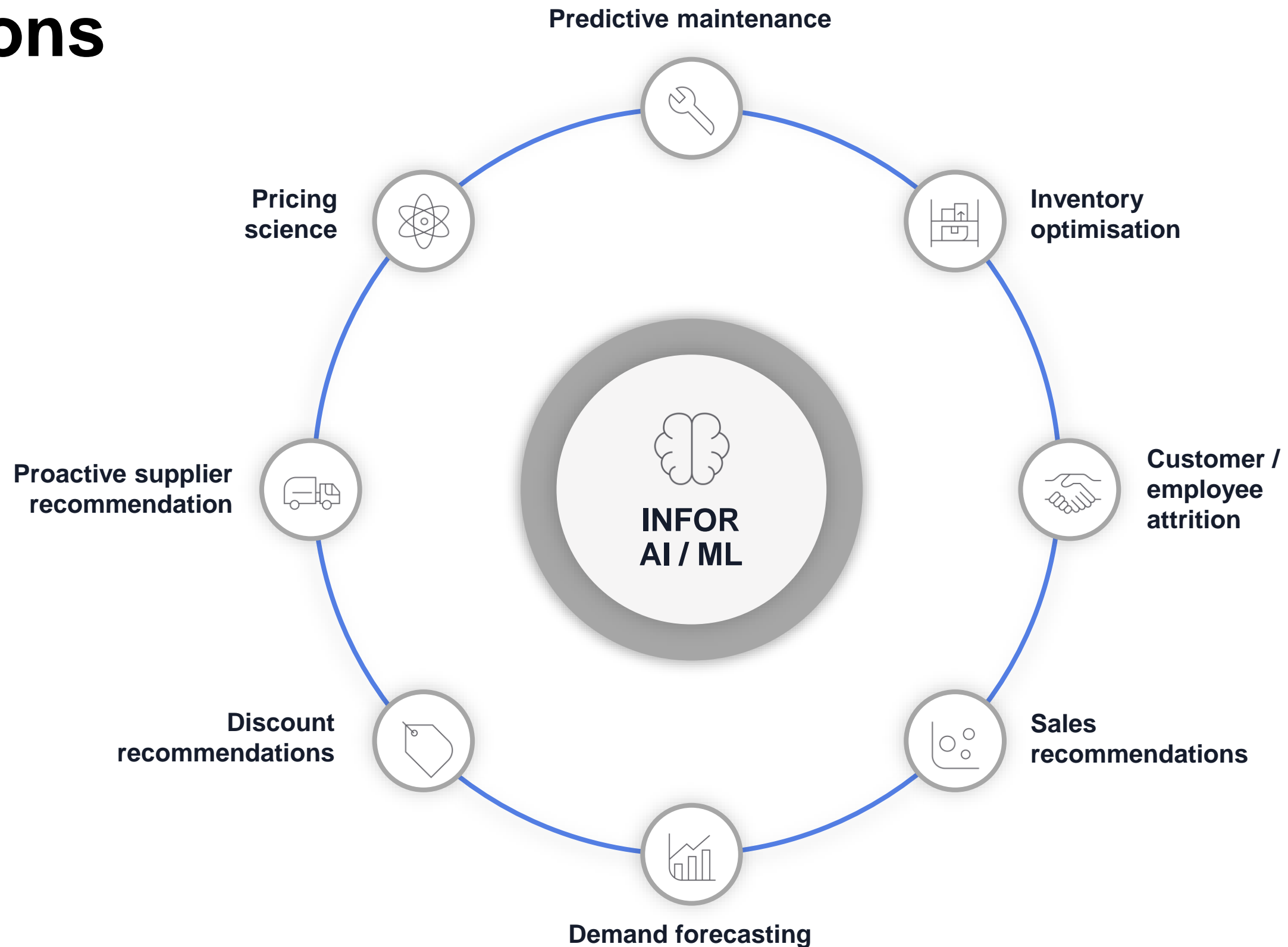
"FieldName": "Total SEK",
"FieldValue": "SEK 53.82",
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  "Value": "TOTAL"
}
  
```

Solution overview

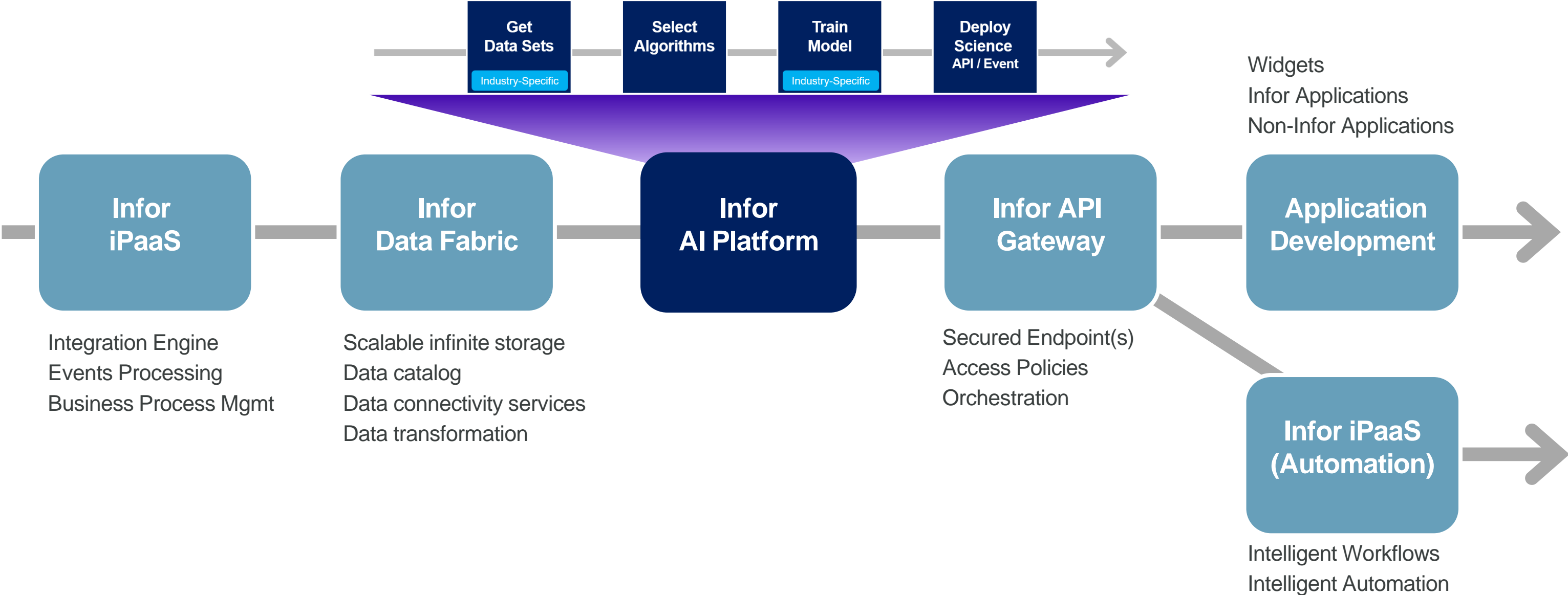
# AI & ML

# Infor AI / ML Solutions

Common infrastructure and access to application data and schemas allows Infor the unique opportunity to create repeatable Machine Learning experiences across all industries, creating a library of solutions.



# Enterprise AI ensemble – End to end



# Generative AI @ Infor

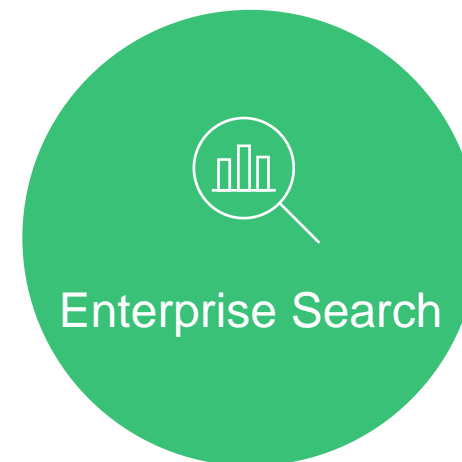
## Vision

### “Jump start” anything

Code Generation for developers  
Email/ text/ audio/ video generation  
Draft designs/ models  
Language Translations



Content Creation



Enterprise Search

### Enterprise Data Access

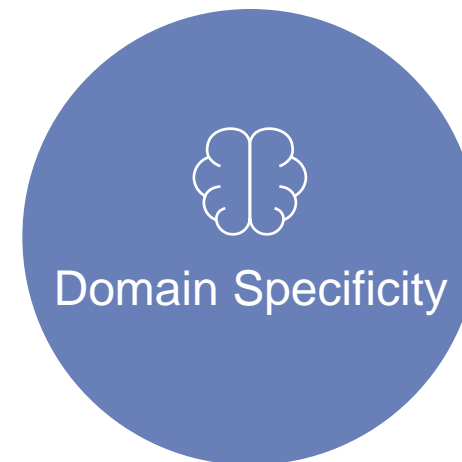
NLP based access to enterprise data  
Look up, take actions with natural language  
Gen AI for Text to SQL, Text to API  
Application navigation with voice

### Knowledge Base

Conversational Ux to access user manuals, wiki,  
support incidents, employee handbook  
Summarization of any content



May I help you?



Domain Specificity

### Industry Specific

Decision based AI Automations  
Document/ Image classification  
**Fine tuned LLMs per industry**

# Infor Enterprise Automation

Enterprise Automation is the concept of automating everything in an organization 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 **organizations improve efficiency and accuracy**, speed up processes, and free up employees to focus on more strategic work



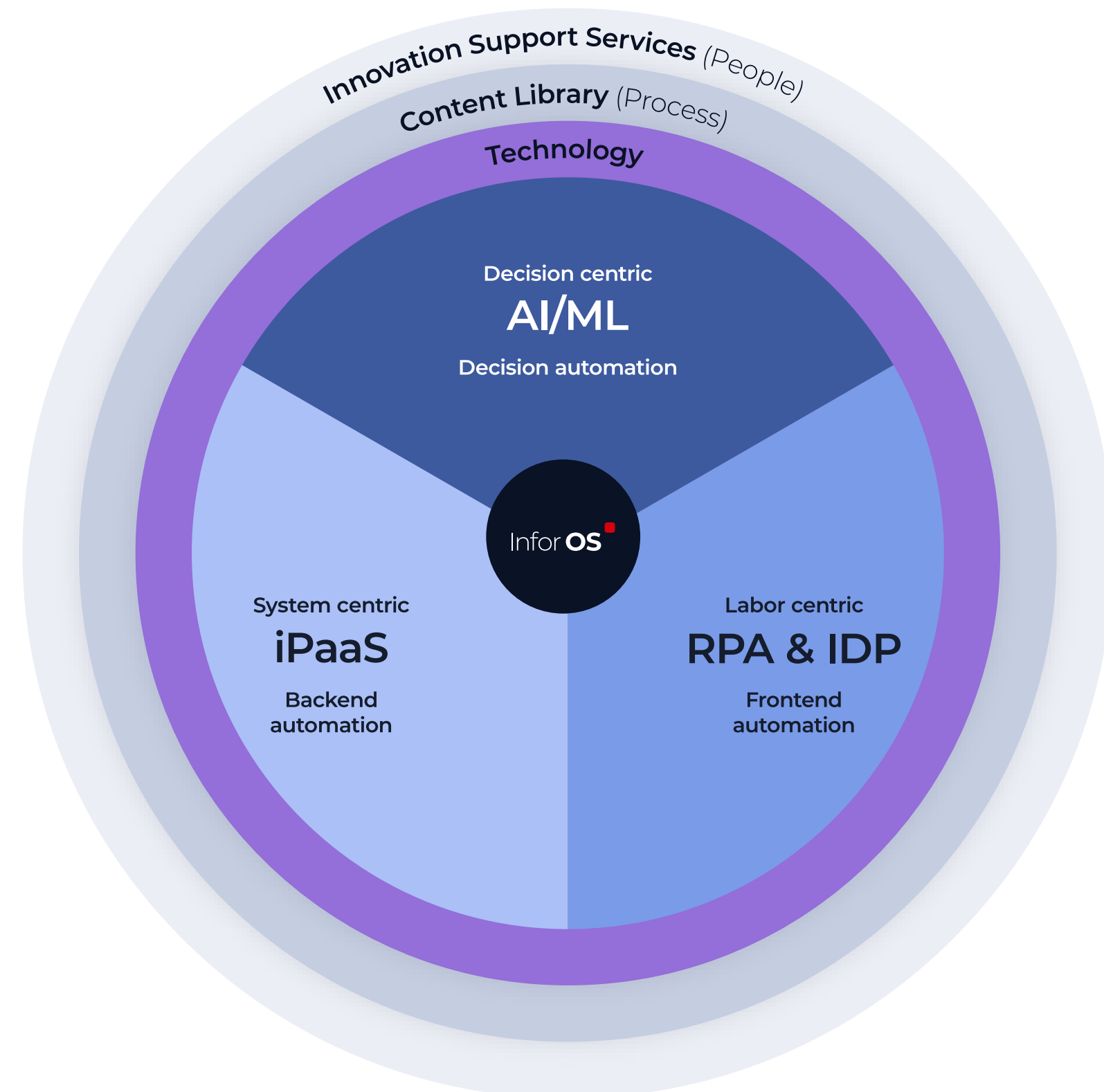


# Infor Enterprise Automation

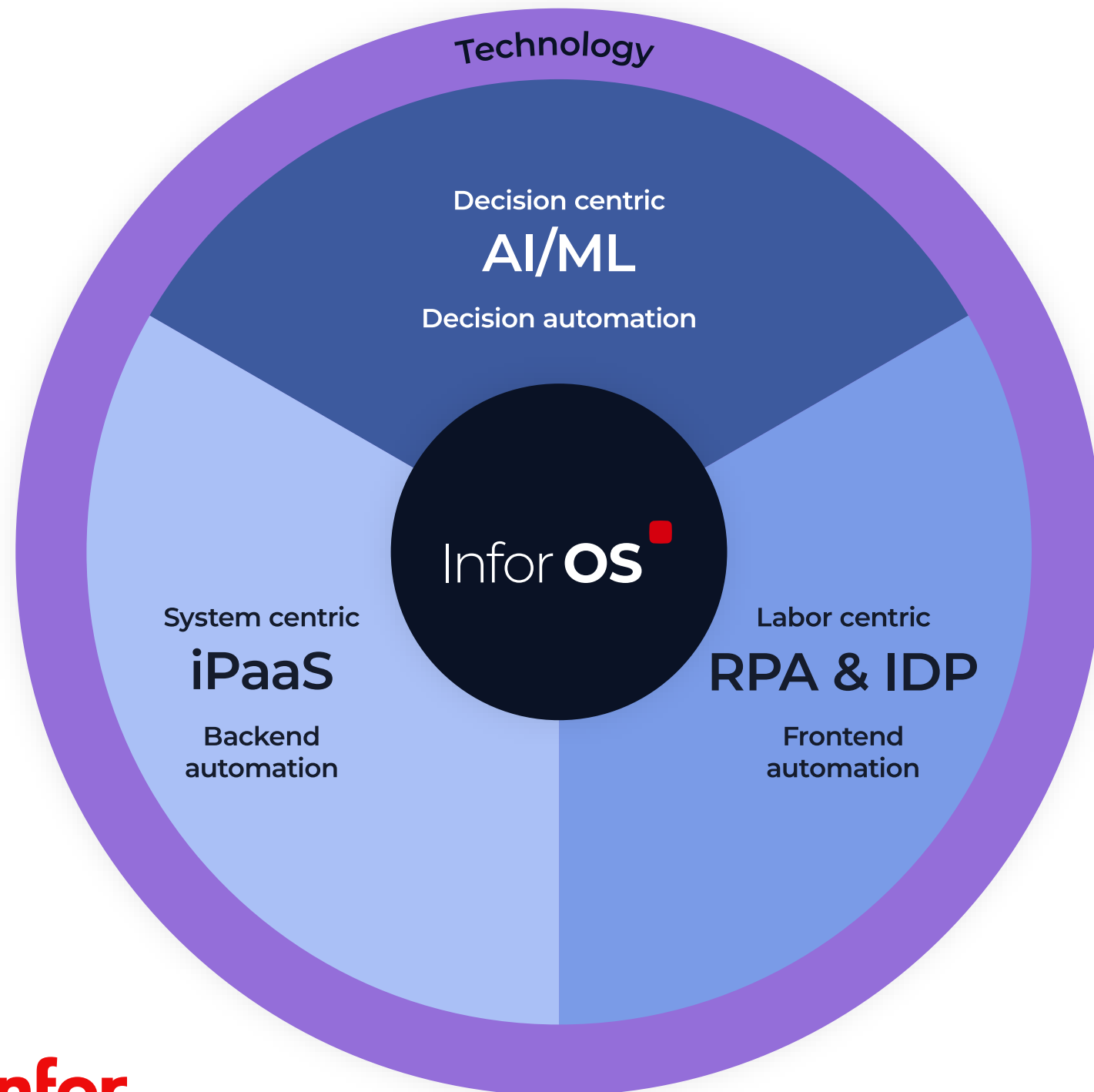
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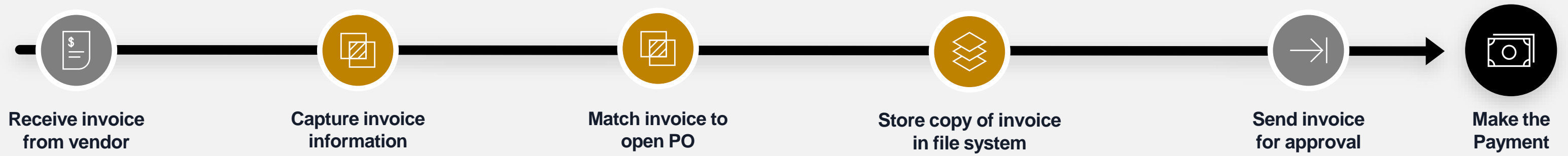


# Content based library

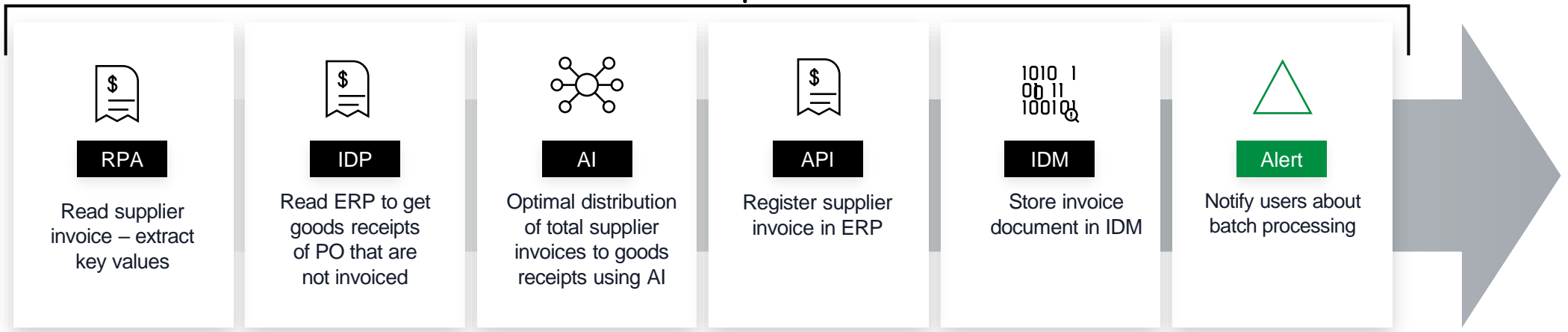
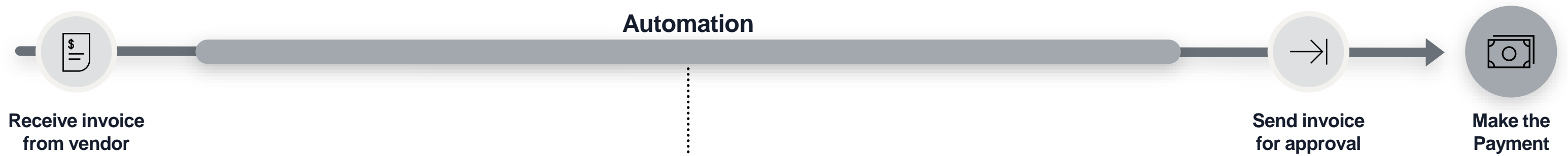


# Supplier Invoice processing & matching

Before



After automation






## Enterprise Automation

Experience the next wave of hyperautomation **infor**

Elevate productivity & performance with Infor Enterprise Automation



### Enterprise Automation



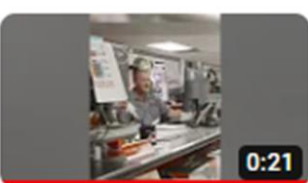
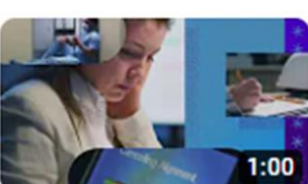



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# Demos – RPA

## 01

### Exchange rates

Read exchange rates from XE.com and update CRS055 in M3.

## 02

### Price lists

Update price lists from two sources:

1. Excel file from a mail attachment.

RPA will use an API flow to handle the M3 API communication.

## 03

### Sales order

Using OCR APIs, extract certain order data from standard M3 sales order confirmations and create a new sales orders in M3 from the extracted data.



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