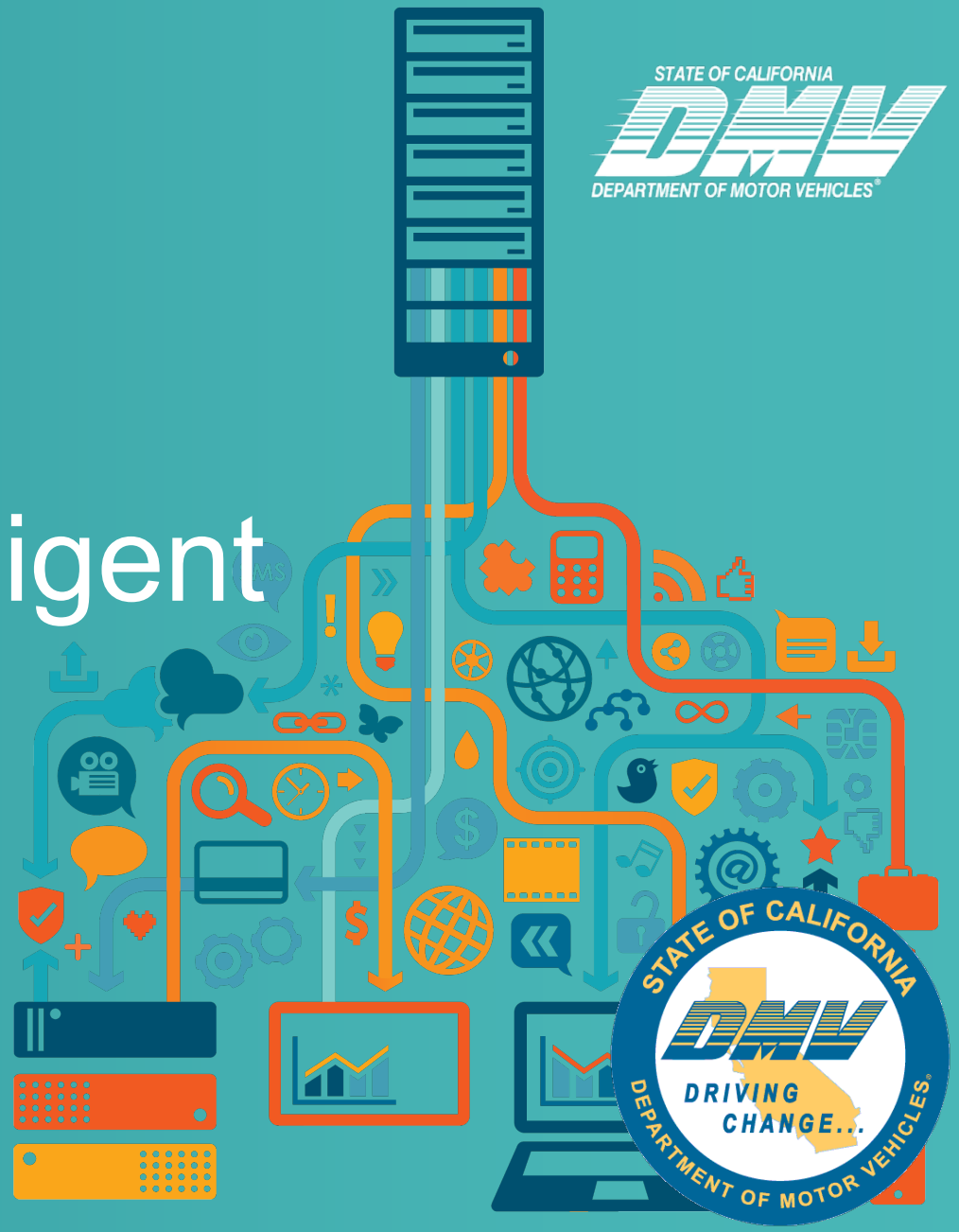
State of California Intelligent Automation Workgroup

Sharing our RPA journeys

DMV, CDPH, FI$Cal, Energy, DOT, EDD, JCC, Wildlife, CalPERS, CDT, CHP,

Covered Cal, SCO, DGS, DOR, CalSTA, SCIF, HCAI, NV DMV

09/15/2022



Agenda

- Attendance and new attendee introductions
- Expanding the scope of the DMV COE to intelligent automation
- Roundtable - Latest trends, Updates, Opportunities, Needs
- New RPA use cases and Statewide reuse opportunities
  - Employee Action Request form submission
  - Time Reporting for Special Pay Processing
- Beyond process automation - Infrastructure automation using RPA
- (Time Permitting) - Alternate automation strategies for legacy transformation

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Objectives of this forum :

To share ideas, experiences and our robotic process automation journey across the State to improve operations and gain efficiencies

RPA Center of Excellence Artifacts – Available

- Picking the right projects
  - Business Case Development
  - Concept Commit
  - Execution Commit
  - Readiness Validation
  - ROI Calculations
- Picking the right design pattern
  - Paper to Digital Bots (Using online workflow accelerators)
  - Backoffice Processing Bots (augmenting steps in a complex process)
  - Integration Bots (Queues and APIs. Design pattern for Near Real Time)
  - Conversion/File Bots (One time/ad hoc use in bulk)
  - Intelligent Document Processing Bots (digitizing paper mail processing using AI)
  - **Long running workflows (time and event based pauses in processes)**
- Sharing responsibilities
  - RACI for bot manager, business owners, technical team, executives, compliance
  - Organization readiness
- Execution and support model
  - Timelines and milestones
  - Status reporting and continuous improvement
  - Bot scheduling optimization model and templates\
  - RPA portfolio ROI calculation sheet

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DMV's Robotic Process Automation COE is now **Intelligent Automation COE**:

Manage the technology, process and governance to support department wide intelligent automation initiatives while creating secure, reliable and repeatable implementations of robotics, **AI/ML and workflow based** automation

Intelligent Automation in Action

RPA + AI/ML use cases

- Digital Mail Room using Intelligent Document Processing
- Virtual Field Office using Intelligent Document Processing
- Environmental License Plate using Machine Learning Models

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Roundtable – ALL

Latest trends, upcoming opportunities, possible needs, Topics of interest

DMV, ***CDPH***, OSHPD, **FI$Cal**, **Energy**, **DOT**, EDD, JCC, Wildlife, **CalPERS**, **CDT**, CHP, Covered Cal, **SCO**, DGS, ***DOR***, **CalSTA**, SCIF, ***HCAI***, ***Nevada DMV***, **HSR**

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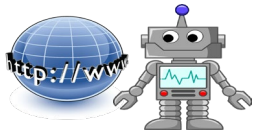
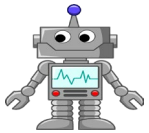
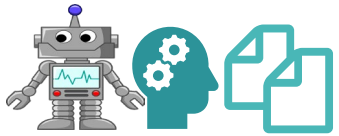
What's new? - DMV

Intelligent Automation@DMV in Action

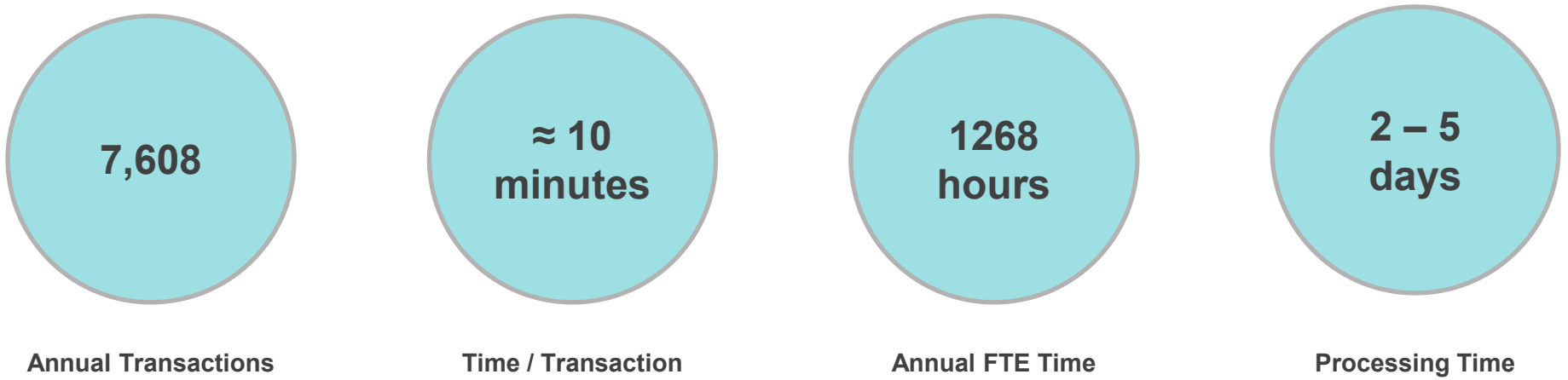
36* Use Cases Deployed	>185 K Tech Hours Saved	>1M Sheets of paper saved	>6.8M Transactions Processed
 13 Web Automation Use Cases*	 23 Bot Only Use Cases	 3 of 36 use cases with AI/ML	 >$8.8M Savings/Cost Avoidance

*6 use cases end of life/fully realized (Temp DL ext., 2nd Residency, and Digital Mailroom (NRL), 2 Payment Catchup Bots, AKTE bot)

New use case with Statewide applicability

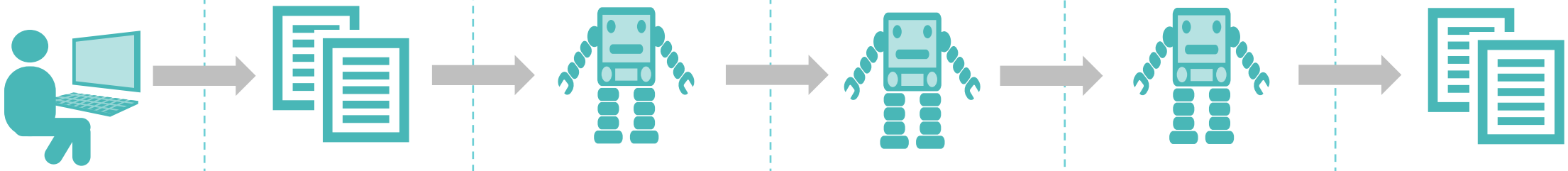
SCO Employee Action Request / STD 686

- Intelligent Automation beyond DMVs infrastructure
- Secure integrations between DocuSign, DMV, AWS, SCO mainframe
- Time sensitive as it impacts employee paycheck (withholding changes)
- No manual keying data / eliminating keying errors
- Additional savings in printing and storage costs



New use case…

SCO Employee Action Request / STD 686



Employee fills out online EAR form & HRB Specialist approves changes	DocuSign sends encrypted data to DMV's AWS workflows	Bot establishes secure connection to SCO system and validates user data	Bot makes updates to user data (address, withholdings, etc.) & captures exceptions	Upon success, bot requests copy of completed PDF and archives internally	Employee receives a completed copy of EAR STD 686 form in an email
DocuSign	**AWS Lambda f(x)**	**UiPath Bot**	**UiPath Bot**	**UiPath Bot**	**DocuSign**

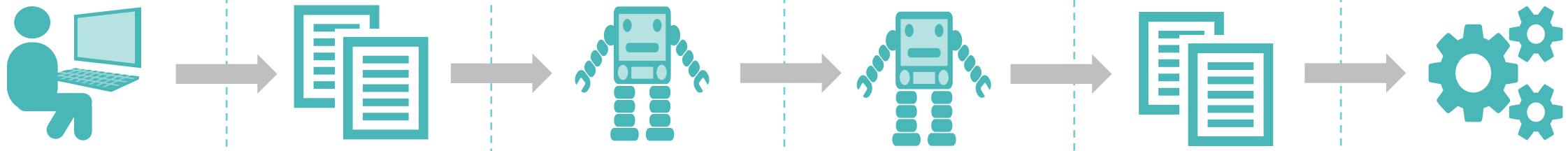
Another use case in works with Statewide applicability

Special Pay Processing

- Intermittent Pay, Overtime Pay, Intermittent Leave
- Timesheets / CalHR Interface / SCO Interface
- Time sensitive / impacts employee pay checks
- Manual data lookup (base pay, pay differentials, flex cash, etc.)
- Manual key data input / keying errors

Another use case…

Special Pay Processing with Intelligent Automation



Employee enters time & supervisor approves	System calculates OT, INT pay, INT leave usage and creates report	Bot interacts with SCO interface to calculate OT rates	Based on data received, bot generates 672 / 673 format files for SCO	Bot uploads the files to SCO FTP system	SCO processes the files, issues pay, updates leave usages and accruals
Dayforce App	**Dayforce App**	**UiPath Bot**	**UiPath Bot**	**UiPath Bot**	**SCO Systems**

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RPA in Infrastructure Automation

- *SAIC (content contribution)*

RPA USE CASES FOR INFRASTRUCTURE MANAGEMENT

Data Management	**Network Management**	**Onboarding/ Offboarding**	**IT Support/Helpdesk**	**Security Management**	Software Testing
Data Entry • Copy/Paste from one system to another • Using OCR functionality to obtain data from scanned documents	Monitor Server Connections & latency • Monitor connections • Perform diagnostic actions	Automation to create/disable: • Business emails • Accounts • Password resets	Automation to create/route/resolve support requests	Detecting system vulnerabilities and threats	Perform numerous software tests, such as: • Smoke tests • Unit tests • Integration tests • Visual Regression tests • User Interaction tests
Data Transfer • Automate data transfer from legacy systems to reduce errors and duplications	Monitor Cloud Storage Utilization	Automating user access	Installation & configuration of software on machines	Perform security controls	Setting up test environments
Health Reporting • Centralize data into a report or dashboard to organize data to identify trends	Automating Protocol Execution		Responding to hardware requests	Automation for system backups and patch installations	Perform QA & Services Audit
Data Validation	Manage Network Security				

DETAILED USE CASE #1

SELF HEALING BY AUTOMATING SYSTEMS MONITORING

SAIC Proof Point:

- A series of bots for a Civilian USG RPA customer monitor that key systems are operational and confirm the interfaces between multiple systems ran successfully and notify stakeholders of statuses and health of the systems.

Scenario:
An application that is critical for a company has an outage at 1:00am. The first employee to log in for the day logs in at 8:00am, and notices the application is down. The employee logs a support request with IT

Problem: The outage takes 7 hours to be identified and acted on.

Solution: An RPA bot is configured to constantly run at all hours of the day. The purpose of this bot is to test system connectivity. When the bot finds an issue with one of the systems, it reads the error message provided, and determines what the next steps are as part of the automated workflow.

If an automated solution is available, the bot will follow the appropriate workflow to fix the error immediately.

If no automated solution is available, the bot will create a support request, route it to the appropriate support person, and send notification of the support request.

The RPA Advantage: RPA can automate certain actions that monitoring systems cannot.

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DETAILED USE CASE #2

SUPPORT REQUEST INTELLIGENT ROUTING

SAIC Proof Point:
SAIC internally uses a bot to assign contract project financial support tickets to appropriate staff through pre-determined logic eliminating the need for these tickets to be assigned manually.

Scenario:
Support requests are commonly touched multiple times at various stages, and require manual routing and monitoring.

Problem: Due to the common high volume of support requests, the amount of manual work required can equate to long completion times and a need for more support staff.

Solution: RPA bots can create, route, assign, and document support requests, depending on predetermined requirements.

The RPA Advantage: RPA fills a common gap where support/help desk tools require manual intervention by offering automated processes to use AI to integrate with various systems, including legacy systems.

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DETAILED USE CASE #3

CENTRALIZE PROCESS & SYSTEM DATA

SAIC Proof Point:
A Civilian USG RPA customer has a group of bots that extract and transform data from an IT ticketing system to generate a series of reports to highlight key performance indicators, metrics, and common ticket items.

Scenario:
The company is receiving complaints of certain systems frequently having outages, or processes that are taking longer than usual.

Problem: It is difficult to come to a conclusion on what the problem is and why it is occurring.

Solution: RPA bots can perform the repetitive task of gathering process data at each step of a given workflow. That data can be cleanly presented in a report or dashboard to highlight areas that have specific trends, such as high volume of workflow exceptions, time out issues, or system connectivity issues. Specifically, if a workflow consists of a series of 50 steps that the bot takes, we can analyze exceptions close enough to be able to zero in on the exact steps that are frequently breaking.

Our RPA bots gathering all this data make it easier to monitor and understand the health of our processes, automations, and systems.

The RPA Advantage: While there are many data tools available, RPA improves data analytics by offering a centralized solution to multiple applications and legacy systems, as well as offering customized actions to be taken automatically.

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