



RPA in Finance at Griffith University

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ACKNOWLEDGEMENT OF COUNTRY

*Griffith University acknowledges the Traditional Custodians
of the land on which we are meeting and pays respect to the
Elders, past and present, and extends that respect to all
Aboriginal and Torres Strait Islander people.*

Before we begin....

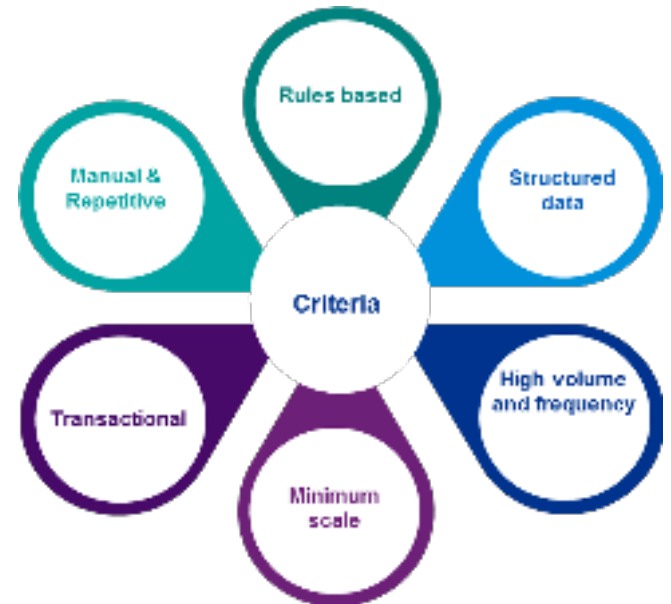


What is RPA?

- RPA = Robotic Process Automation
- A technology underpinning *business process automation* based on artificial intelligence ideas.
- Software robots replicate the actions of staff interacting with the user interface
- RPA technologies have significantly matured in the last 24 months
- Is being used in several Universities eg University of Auckland, Edith Cowan, and University of Melbourne and many more corporate organisations, particularly in financial services.
- Using a business process visualisation tool to train the software robot enables the operational function to drive business process improvements and deliver efficiencies quickly as well.
- Can enter or move data between systems, perform calculations, or undertake specific defined actions such as sending emails.
- Can stir emotional responses where staff are resistant to change

Where can RPA be used?

- Email management
- Scraping data from documents or websites
- Accounts Payable processing
- Accounts Receivable processing
- Reconciliations or other data matching
- Posting Journals
- Preparing reports and dashboards
- Vendor management
- Inventory management
- Data validation or data movement
- Agents commissions

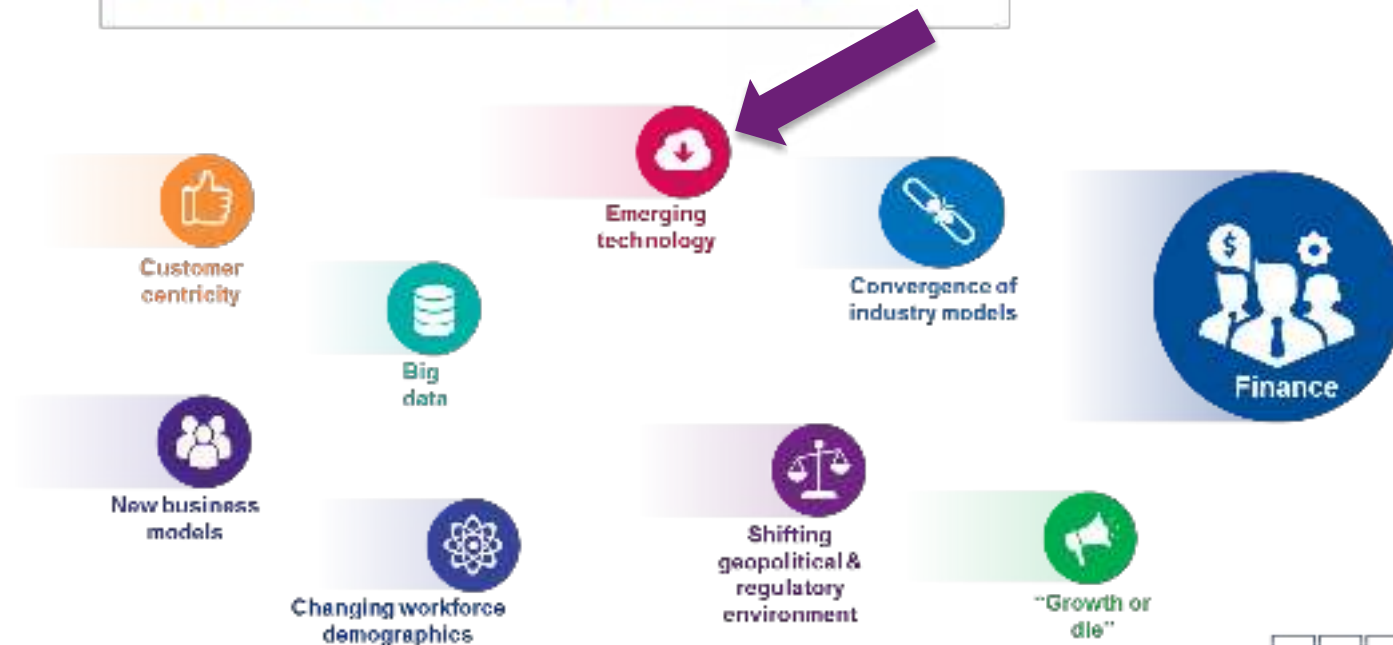


Why RPA at Griffith?

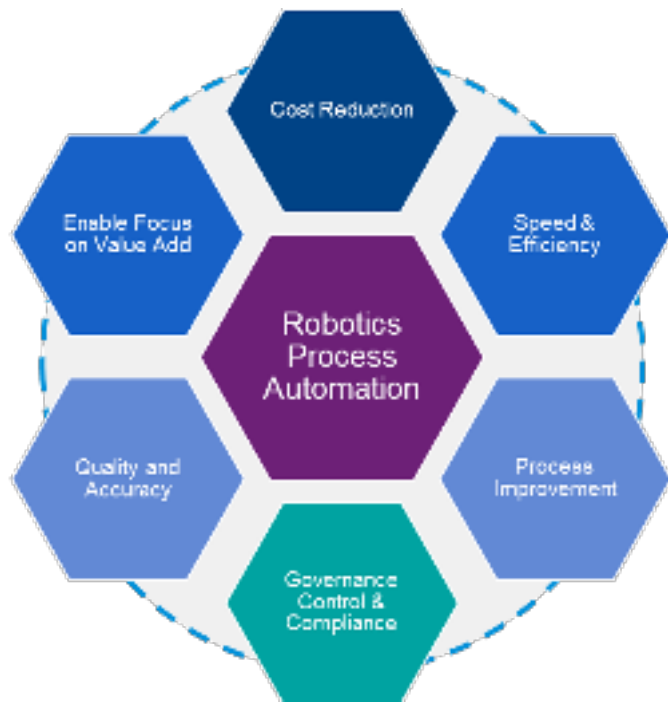
- Strategic objective of utilising technology to create capacity
- Automate resource intensive activities
- Process review and continuous improvement
- Update business process documentation

Cross-sector business disruptors

Finance must disrupt itself to stay in front of change.



Business case for automation



RPA Governance Layer

RPA Governance Layer outlining the roles and responsibilities across the RPA Board, Finance Transformation team and extended key stakeholders. Further detail on the RPA Board responsibilities is documented in the approved RPA Program Board Terms of Reference.

RPA Program Board Objectives and Responsibilities

Strategic decisions

- Decision making forum for all strategic RPA issues (eg tools, vendor partner etc)
- Escalation point for delivery issues and risks for RPA projects

Pipeline Management

- Gate-keeper for demand generated pipeline; prioritizing activities
- Define, prioritise and approve the RPA change schedule

Benefits realisation

- Accountability for benefits realisation
- Communicate RPA successes and program of work across Office of Finance

Continuous Improvement

- Identifying opportunities for Office of Finance
- Providing sponsorship for RPA

Key stakeholders

CFO

- Chair of RPA Program Board
- Accountable to VP Corporate Services for delivery of the Finance 2017/2018 strategic objectives

Head of Finance Transformation

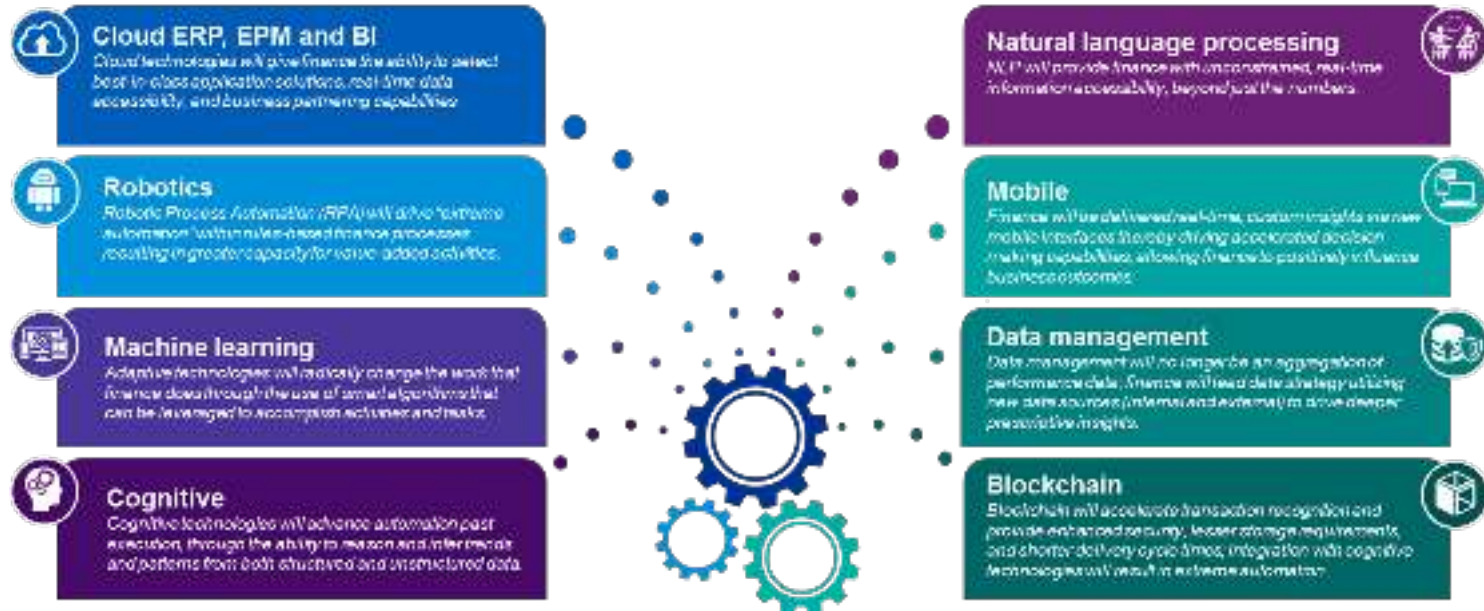
- Responsible for managing the program of work including all risks, interdependencies and schedule for program
- Gatekeeper for demand on RPA capability

Finance SMT

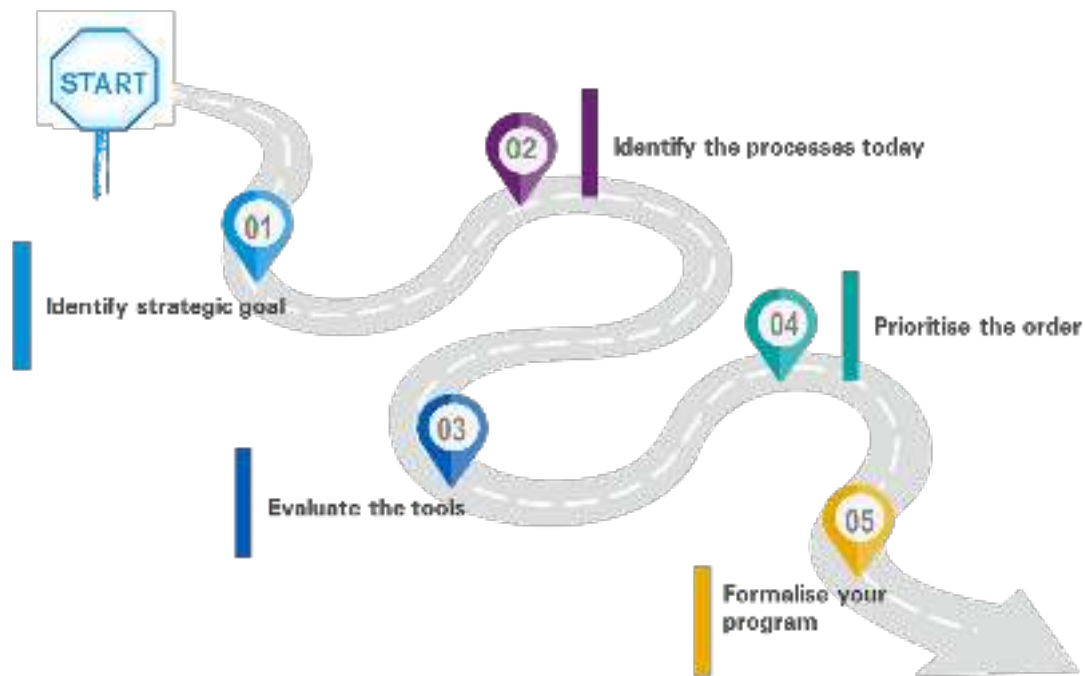
- Consumer of RPA services, managing alignment with team business strategies
- Assist with the development of the benefits case



The finance technology ecosystem will continue to evolve



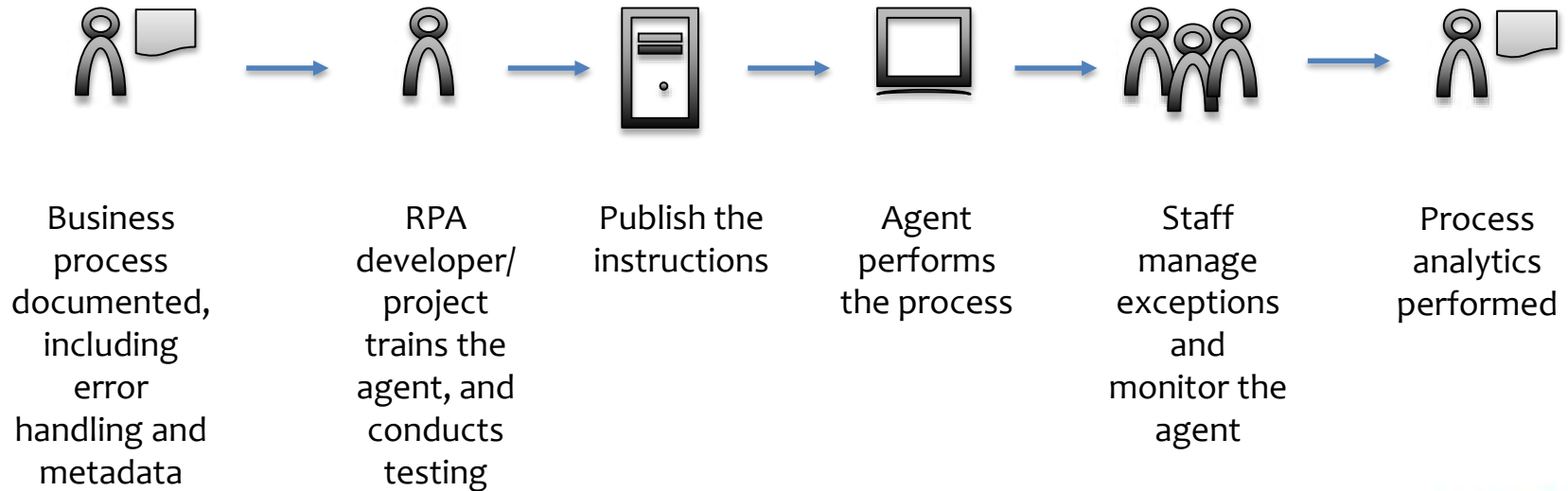
RPA strategic journey map



Initial processes identified at Griffith University

- New Vendor Add
- AmEx journals for travel
- Budget journals processing
- Research system data interface with the Finance ERP Grants module
- GL distribution overrides
- Salary adjustment journals
- Project Closing

Simple RPA process establishment



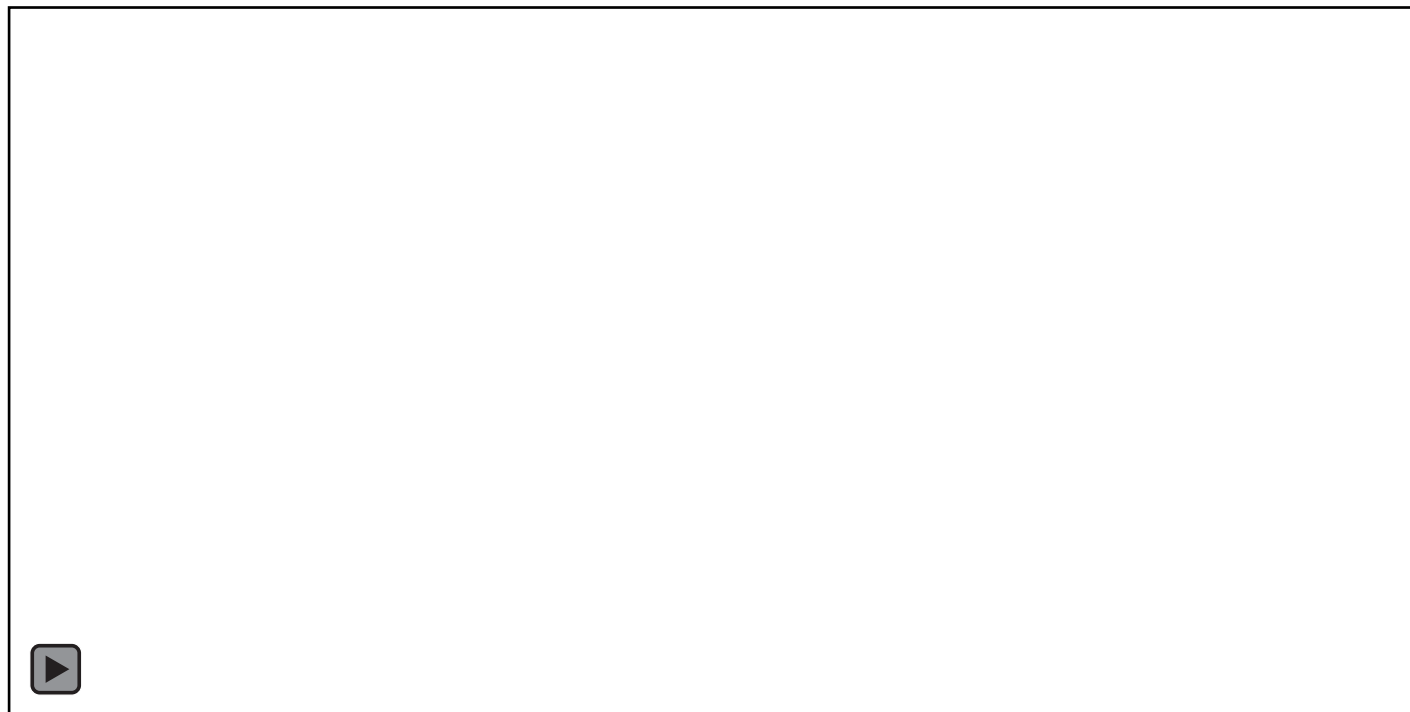
Vendor Set up: Proof of Concept in Griffith Finance

- Establishing new vendors in PeopleSoft was selected as the target business process
- This area was selected due to the high volume of activity, reliance on key staff, and the maturity of the process which is structured and defined.
- This was also assessed as non-intrusive and low risk if errors were made.
- Blackbook PS was identified as the vendor to support us in the POC, using the UiPath software.
- A system accountant and a solution architect also supported the development.

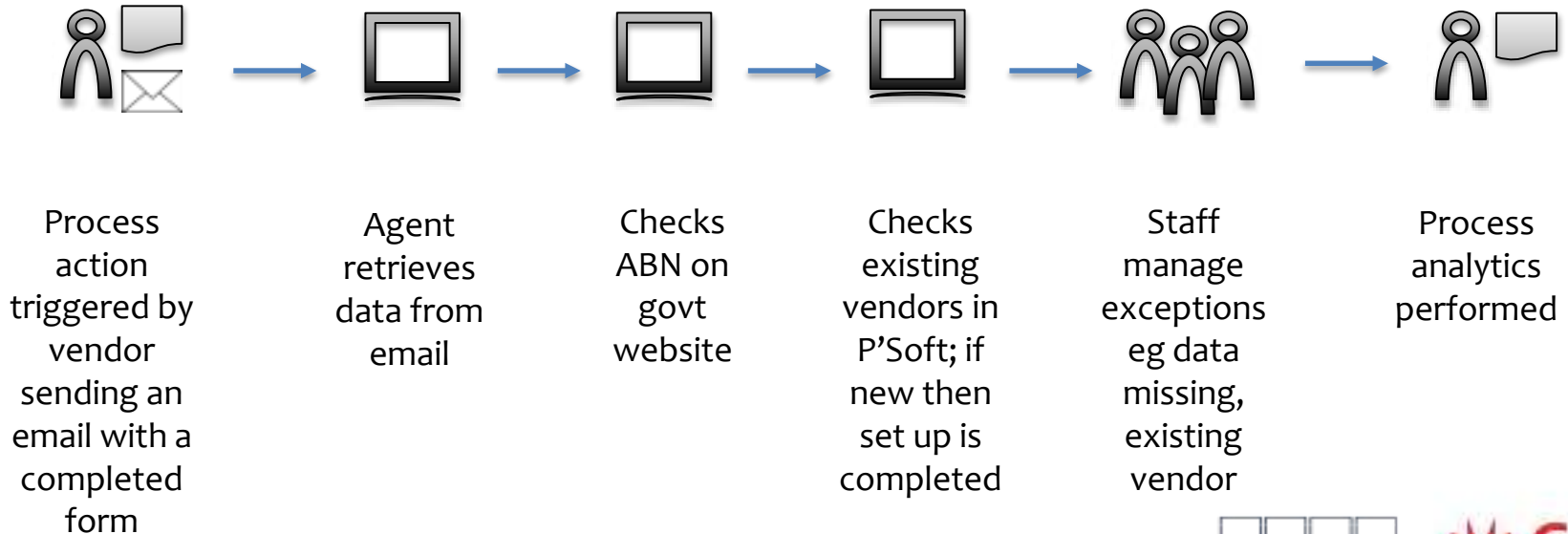
[Vendor set up demo](#)



Vendor set up demo



Vendor set up process undertaken



Benefits

- Enables delivery of the Finance strategy of increased focus on strategic value-add
- No coding, easy to learn and allows the business to self-serve
- Agile and responsive to operational changes, agent can be redeployed quickly
- Minimal IT support required
- Cheap and fast to implement and operate, can run 24/7 if needed
- Reduces cycle time of activities
- Follows instructions literally = no data entry errors
- RPA is now considered a mature activity
- Audit trails on data processing will be improved as all steps are logged
- Can be used on low volume or low frequency activities as well as high volume
- Parts of processes can be automated

Risks

- Desire for speed in extracting benefits might drive cutting corners in the set up of the process and governance function
- No clear Griffith University automation strategy – common in many organisations
- Cultural change will be needed to accept RPA in the work place
- Failure to set up metadata may mean the agent operates unchecked
- Process exceptions will always exist but process knowledge may wane over time
- Workforce management will be required for existing resources and for staff to support the solution
- Technology environments will need to be established post proof of concept ; consider how the software will access systems

'Growth' moments

- Conservatism in adapting to the technology
- Security approval and establishing IT environments
- Technical issues with setting up email accounts and system access
- The process is not that simple! Need to run LEAN first and work out how to deal with process exceptions
- Staff knowledge was hard to extract – they were unaware of what they really did
- Need to work out how to extract the benefits through scheduling the work and taking advantage of 24/7 availability
- RPA requires ongoing investment in a system administrator type position

What are Griffith yet to do?

- Continuous review and prioritisation of the activities that we might be able to automate
- Still need to fully train our own staff to support the Agent ; establish a system administrator position and/ or responsibilities
- Change management – this will be ongoing for both directly impacted and indirectly impacted teams
- Documentation – lots of it!!
- Work with the central IT architecture team on playing with Chat Bots and completing an automation strategy

Questions?



OFFICIAL PARTNER



THANK YOU

