RDA VS RPA

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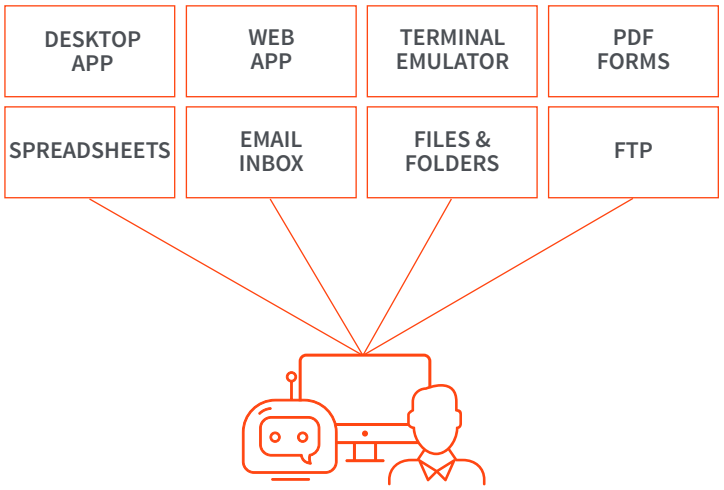
RDA

Attended

Robotic Desktop Automation

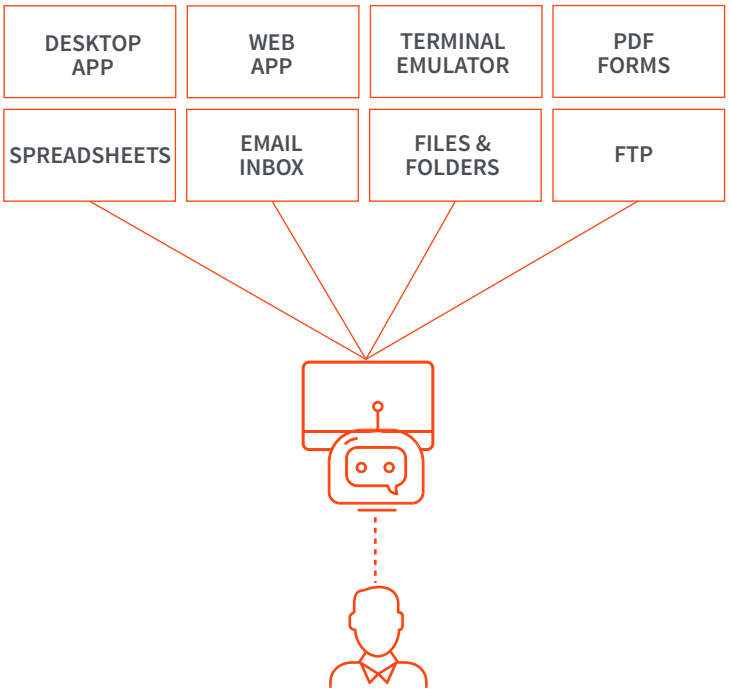


- Assistant to the Employee
- Perfect for Non-Technical & Technical User
- User Initiates Process
- Simple Approach - Task Based
- Think...Microsoft Office Approach

RPA

Unattended

Robotic Process Automation



- Virtual Employee Working in Background
- Handles the Process End-to-End
- Process Initiated Based on Triggers
- Complex Approach - Project Based
- Think...ERP Approach

TYPES OF AUTOMATION

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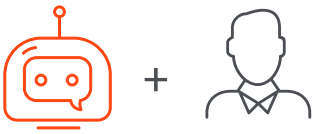
Foxtrot is capable of supporting all types of automation approaches. It is the method and setup that determines the type of automation, which should be decided based on the process & business needs.



ATTENDED AUTOMATION: RDA

Automated process triggered by human agents across multiple applications using a desktop interface. This type of automation will usually run on the local user PC or alternatively on a virtual machine that the user connects to using their credentials.

THE GOAL

To help an employee to perform tasks quicker by increasing speed of their otherwise manual steps in a process. This type of automation should not seek to change the process but only assist to perform and complete faster with less error. The employee is still the responsible one that performs the task and should be held responsible for what is performed. In this type of automation, the employee usually sets it up themselves - they build their own robot to solve personal tasks.

Benefits

- Complex processes can be replaced with single mouse clicks, reducing the time it takes to train an agent.
- Average Handling times can be reduced, resulting in savings and improved customer experience.
- User is still in control and can interact with the robot.
- Limited development time because the user is still involved and can handle unexpected errors.

Considerations

- Inconsistency of desktop environments can slow down completion times.
- Depends on and requires human attention - will only run when the user activates the robot.
- The employee will not be able to work on their machine while the robot is running, unless executed from a virtual machine.

UNATTENDED AUTOMATION: RPA

Automated processes that run on machines without needing human control. This type of automation will usually run on a virtual machine with its own credentials or alternatively on an independent physical machine in the office.

THE GOAL

To automate a process in the background that can run at any appropriate time without the need of human attention. This is an end-to-end approach that requires the robot to know everything about the process in order to be able to complete the task without failing during the process due to unexpected events. In this type, it is the Foxtrot Administrator that is responsible for the actions of the robots.

Benefits

- Robots can operate 24 hours a day, 7 days a week, only alerting an employee when something goes wrong.
- Any applications can be automated to perform on par with specially tailored business systems.
- Does not depend on or require human attention. Can be executed at any given time.

Considerations

- Structured, digital information and clearly defined rules are required to minimize human intervention.
- Requires comprehensive development and setup of the robot to handle process end-to-end.
- Deployment time is lengthy.

WHERE CAN FOXTROT BE DEPLOYED?

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LOCAL EMPLOYEE PHYSICAL MACHINE

Install and use Foxtrot on the machine that the employee is already using for their daily work

Benefits

- Great for ad-hoc projects
- Immediate Deployment - no need for IT
- Employee will have access to all applications right away
- Employee will be used to working on this machine and navigating the each system
- No altered governance - Foxtrot will run using credentials & rights of the employee

Considerations

- Not suitable for end-to-end processes
- The employee will not be able to work while Foxtrot is running
- The machine needs to be powered on and connected to the network
- Everything will be employee dependent – IT will not have ownership

INDEPENDENT PHYSICAL MACHINE

Install and use Foxtrot on a separate physical machine in the office dedicated to automating tasks

Benefits

- Great for ad-hoc projects and can handle complex processes
- Semi fast deployment – Easy for IT to setup
- The environment on the machine will be familiar for employees
- The user can work on their own PC while Foxtrot is running
- IT decides whether the user should login using their credentials or dedicate a new account to the Foxtrot machine

Considerations

- Harder for IT to administrate than a Virtual Machine
- The machine needs to be powered on and connected to the network
- Takes up office space
- Not technically upgradable or flexible

VIRTUAL MACHINE

Install and use Foxtrot on a virtual machine that the user can connect to

Benefits

- Foxtrot will be able to run at any given time
- The robots can be easily governed, overseen and maintained
- IT will have full control and will be able to easily upgrade or adjust the virtual machine from a central location
- IT can decide whether the users should login using their credentials or dedicate a new account to the Foxtrot machine
- Multiple virtual machines can be accessed and worked with at the same time

Considerations

- Not as accessible for users as physical machines
- Lengthy deployment time – dependent on IT
- Requires new governance setup to support independent robots

ACCESS & SECURITY

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PROFILES

Utilizing functionality within the Foxtrot Admin Center, customers have the ability to customize User setup. As an example, to follow separation of duty requirements, the Foxtrot Administrator creates a User profile that allows for script creation but not script execution. A different user is created that cannot write scripts but only run them.

	Administrator	User	Scripter	Operator
Create & Edit Scripts	✓	✓	✓	
Run Scripts	✓	✓		✓
Access Foxtrot Administrator	✓			

ACCESS

Foxtrot does not create user profiles or establish permissions for other applications. The Foxtrot User can only access other applications based on what has been established by the customer. As an example, if a User does not have access to maintenance functions within their core application, then the Foxtrot script will not be executable.

REPORTING

For security monitoring, Foxtrot tracks all activities performed by the user and writes to a report. These reports are used by the Information Security area to monitor and/or research User activity. Applications outside of Foxtrot would continue to produce User activity reports based on parameters established by the customer with those applications.

CATEGORY	EXAMPLE
History Events	'History Exported'
Configuration Changes	'License Path Changed'
Licensing Events	'License Obtained'
Login History	'User Logged In'
Application Event	'Application Opened'
Project Events	'Project Opened'
Data Events	'Data Opened' 'Data Saved'
Project Run Events	'Run State: Running'
Recovery Events	'Core file missing, or corrupt.'