

Data Preparation for Robotic Process Automation

Building a Foundation for Fast & Effective RPA



How to streamline RPA with Knowledge Works:

Data analysis

Source data is quickly audited for errors and anomalies are corrected. For large datasets, metadata uncovers quality issues.

Create an automated workflow

A re-usable workflow to clean, blend and format the data is created.

Testing

The workflow is evaluated against a representative data sample and adjustments are made

Transformation

Once you have a final workflow, the actual data prep process is put in place.

Backflow of cleaned data

Finally, steps must also be taken for the clean data to replace the original dirty data sources.

Altair solutions are designed to automate your repeatable processes, eliminate the need to re-key data (saving costly FTE hours) and remove human error – making them a perfect fit for RPA.

Robotic Process Automation (RPA) is the use of robotic software to automate time-consuming, high-volume, repetitive back-office activities. Whether it be the reduction of FTE's or other cost measures the benefits of RPA to an organization can be significant. RPA is driving the next wave of digital transformation goaled with streamlining business activities to lower costs and eliminate human error. Altair can get you started you get started?

The First Mile

RPA Enablement with Data Prep

As daunting as it may seem, getting your data house in order (the first mile in your RPA transformation journey) is far less painful than it used to be. Gone are the days of re-keying data locked in pdfs or text documents and manually combining it with data sets from a plethora of disparate sources.

Before you can maximize the potential cost/ time savings inherent in today's modern RPA solutions, you must first ensure the data sets you are passing to your bots are clean, accurate and complete. You can't expect bots to work any useful magic with incomplete, fuzzy data as their root. What you need is a powerful data preparation solution.

Such a solution can provide your organization with a simple, powerful and automated tool to get you on your way to full blown RPA. Data prep tools allow you to:

- Extract data from any source or system, including PDF and Text files
- Convert unstructured, semi-structured and multi-structured data into rows and columns
- Clean data with pre-built functions – no coding or advanced Excel knowledge required
- Click-to-join disparate data sets to enrich analytics without complicated vLookups
- Build trust in your metrics with auditable change histories and clear data lineage tracking
- Export to any advanced RPA solution
- Automate repeatable processes with reusable 'Models' and 'Workspaces'
- Integrate with other 3rd party applications with open API

Learn more:
altair.com/knowledgeworks

Automate Your Repeatable Processes

The value of data prep resides in its ability to streamline repeatable processes.

Pre-built 'Models' and 'Workspaces' contain all data extraction and cleansing commands needed for preparing recurring reports for input to your RPA solution. Simply refresh the source files and the data prep work is done.

Data Extraction

Legacy systems often lack the capability to pull and feed relevant data from APIs. In such cases, employees manually migrate data using formats like CSV, Excel, PDF, TXT, JSON, XML, HTML and various databases. Data prep software enables your bots to automatically access, extract, join, cleanse and migrate data from any source thus powering your digital workforce to deliver accurate and trusted results.

Autofill your RPA UI Interface

Now that your data is prepped, it's time to feed the bots. The use of advanced export features including custom connectors and APIs can autofill the UI of your chosen RPA solution. Once complete, your digital workforce is fully enabled and ready to produce.

The benefits of RPA are clear in that you can save time, personnel hours and eliminate human error by automating time-consuming, high-volume, repetitive back-office activities. Modern data prep solutions can enable your next gen digital transformation allowing your RPA solution of choice to deliver the results you expect. With your data house in order you are now ready to feed your bots!

Feed Your Bots with More Data

Our heritage in self-service data preparation means that you can better access and manage more data. More internal, external and enterprise-wide sources of data. More files, apps and databases. More big data. More data from PDFs, XML and HTML. More of your deepest, darkest, most unstructured data. Altair makes it all usable and repeatable, maximizing the breadth, integrity, value and insight you get from your data, no matter the origin, format or narrative.

Trust in the Results

More data doesn't have to mean more chaos or more vulnerabilities. With Altair, gone are the self-service siloes, duplications and versioning errors that create dubious analytics. In their place is a secure, unified data management platform that ensures data integrity, user lineage, and control; one that's focused on empowering everyone to be self-sufficient data masters but with the control to allow the right people to access the right data and locking down the wrong data from the wrong people. The result is greater confidence that leads to bolder insights, braver progression and smarter outcomes for individuals and organizations alike.

Free Up Your Human Capital

Through the use of RPA you free up your brightest minds to focus on other tasks. What's more is we're relentlessly innovating the way data is accessed to create greater focus, accountability, insight and action. We're tearing down walls between individuals, disciplines and offices to create new levels of enterprise-wide insight, socialization, trust and progression. More people are free to explore more avenues. Teams can collaborate on the models, predictions and recommendations of their peers with precision, efficiency and agility. People and information alike become invaluable in their ability to move a business forward.



Credit Union Use Case

A leading North American financial institution is using RPA Enablement with Altair® Monarch® to manage closure of overdrawn accounts. Using automation inherent in Monarch they able to generate a daily report of over drawn accounts from their core banking system. Monarch automatically clears the report and pushes it to an RPA system. Using data prep and automation allows the institution to eliminate manual processes and prevent lost revenue.

RPA Initiative to Manage Closure of Overdrawn Accounts

Automated process being instated

- Core banking system generates 'Overdrawn Account' report daily
- Monarch automatically cleans report and pushes to RPA
- RPA closes overdrawn accounts

Eliminates manual processes

Prevents lost revenue