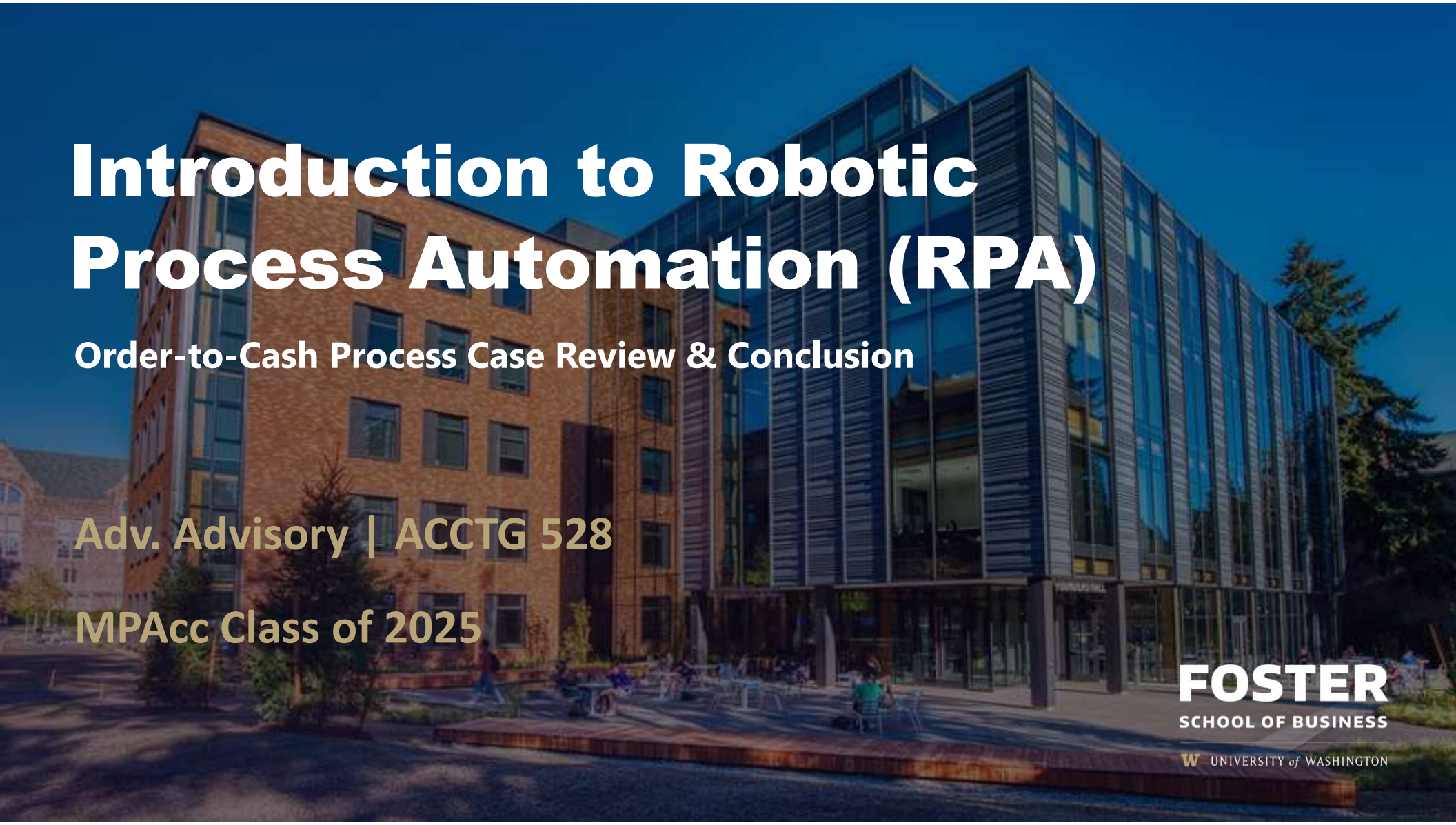

Introduction to Robotic Process Automation (RPA)

Order-to-Cash Process Case Review & Conclusion

Adv. Advisory | ACCTG 528

MPAcc Class of 2025

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Agenda

- **Review**
  - **PollEverywhere Q&A**
- Pure Reformed Oils Case: Concluded
  - Possible extensions
- Individual RPA Challenge
- Workshop / UIPath help

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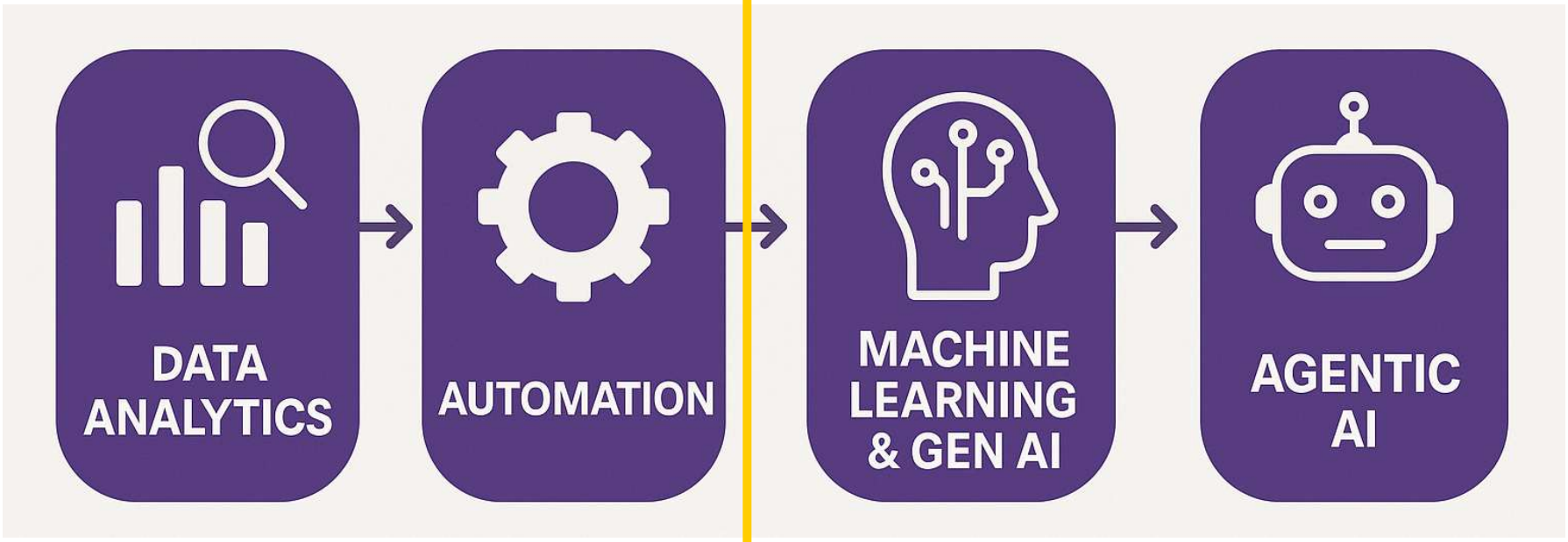
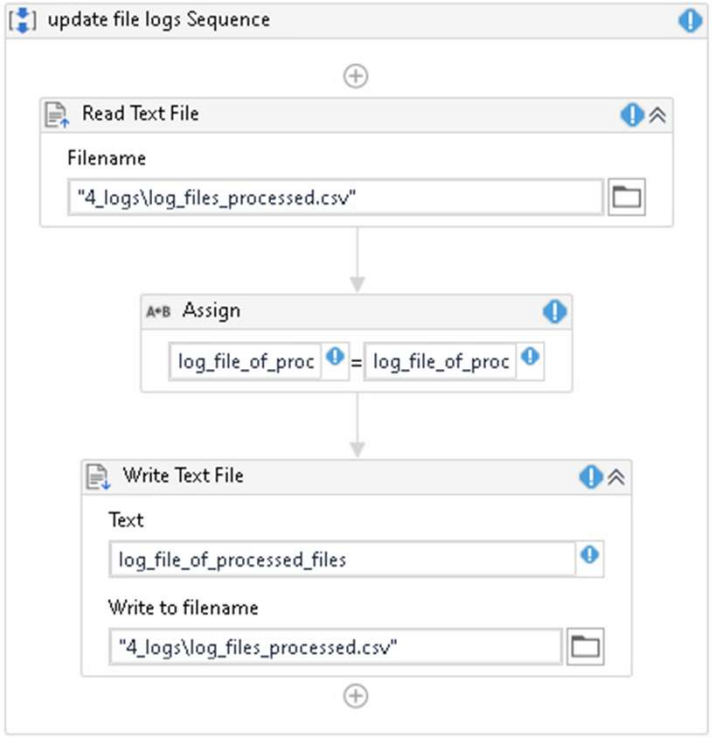
Course Overview



- Order-to-Cash Process Automation
- *UIPath Activities*
- ***Generalizing to any spreadsheet automation***

Q1: Use the image below to answer the following question:

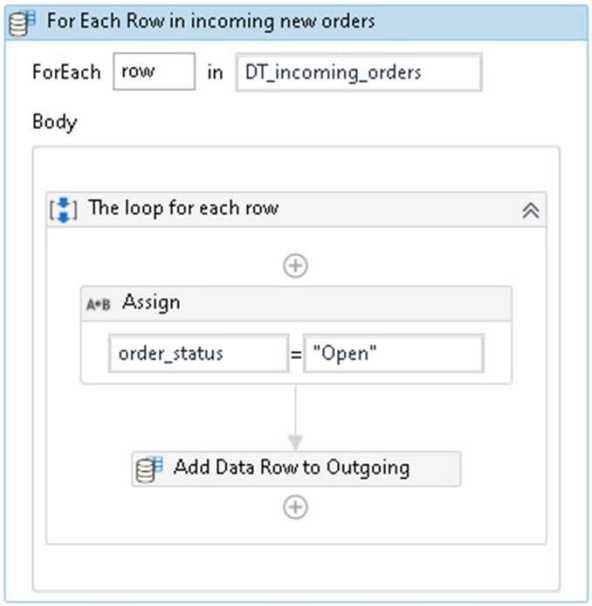


Q2: Use the image below to answer the following question:

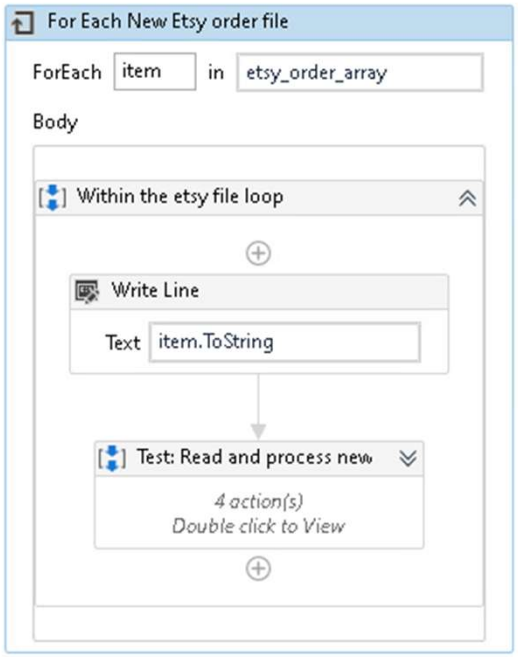
Name	Variable type	Scope
log_file_of_processed_files	String	update file logs Sequence
logger_file	String	PRO: Order-to-Cash RPA
logger_files_to_process	Int32	PRO: Order-to-Cash RPA
DT_processed_files	DataTable	PRO: Order-to-Cash RPA
etsy_files_count	Int32	PRO: Order-to-Cash RPA
ups_files_count	Int32	PRO: Order-to-Cash RPA
ups_files_del_count	Int32	PRO: Order-to-Cash RPA
csv_file_log	String	PRO: Order-to-Cash RPA
etsy_files_array	String[]	PRO: Order-to-Cash RPA
ups_files_array	String[]	PRO: Order-to-Cash RPA
ups_files_del_array	String[]	PRO: Order-to-Cash RPA
DT_erp_customers	DataTable	PRO: Order-to-Cash RPA
DT_erp_sales_orders	DataTable	PRO: Order-to-Cash RPA
etsy_files_array	String	update file logs Sequence
Create Variable		

Q3: Use the images below to answer the following question:

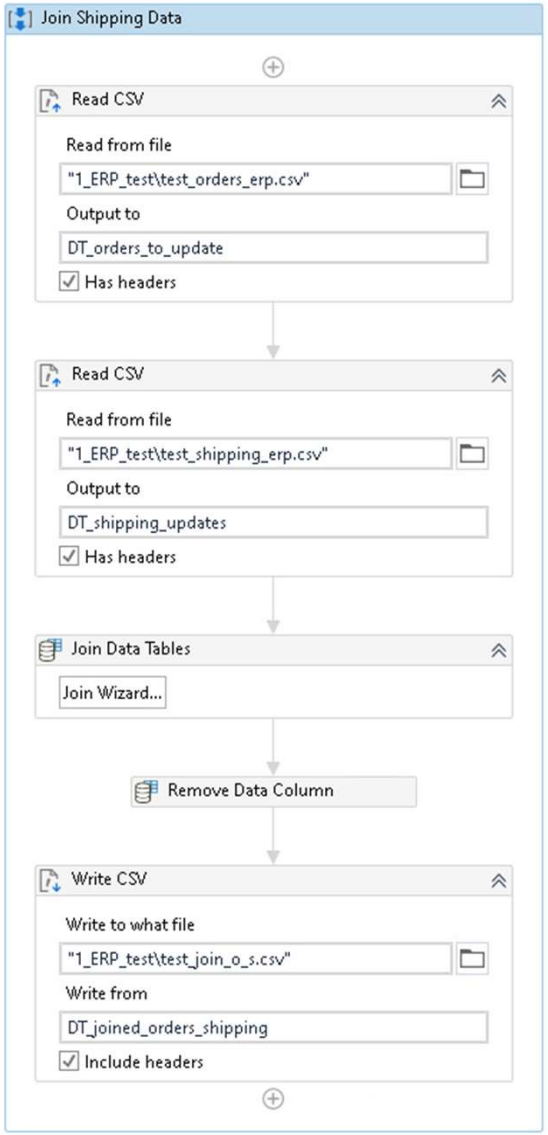
A



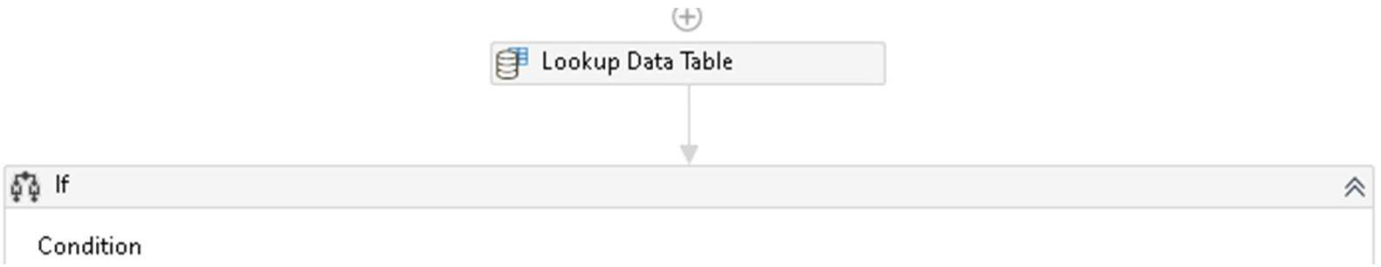
B



Q4: Use the image to answer the following question:



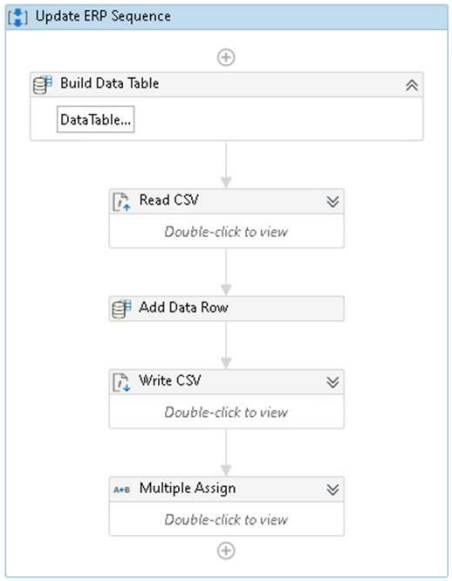
Q5: Use the image below to answer the following question:



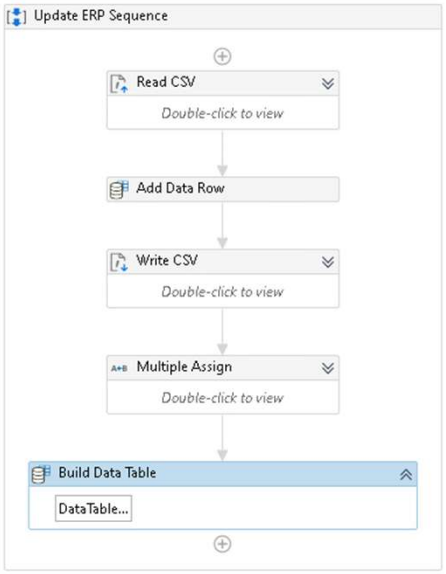
Q6: Use the image below to answer the following question:

Q7: Select from the workflow images below to answer the following question:

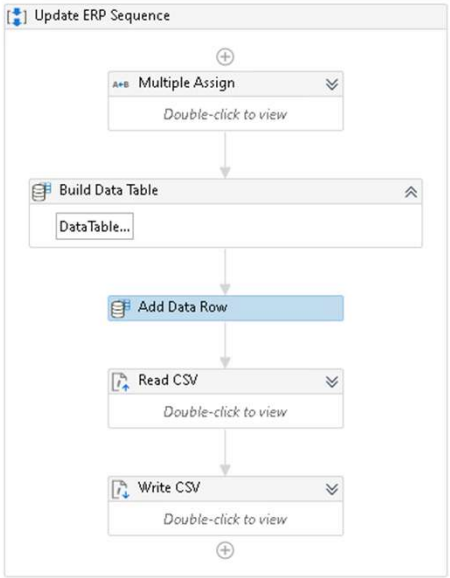
A



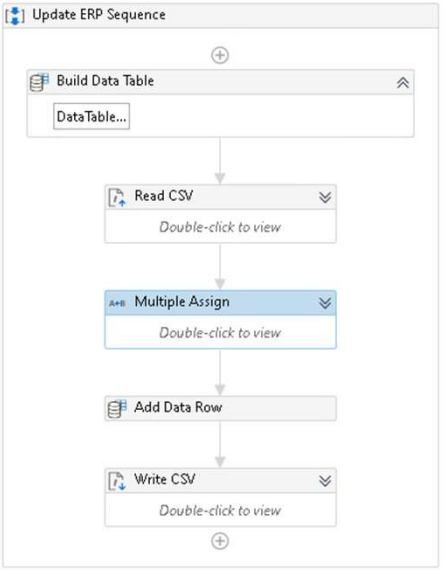
B



C



D



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- Review
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Possible extensions

Create a bot that automates the order-to-cash workflow described by the clients:

1. Move processed files automatically
2. Update ERP for shipments/deliveries
3. Update Inventory levels
4. Create metadata tags, extend the logger (with a json output)
5. Create diagnostic output for a dashboard / create dashboard
6. Other ideas:
    1. ETSY Payments updates
    2. Accounting system
    3. Auto reconciliations, controls
    4. And anything else you think could be automated / improved.

Possible extensions – suggestions & hints

- Remember the video should include inputs & outputs and preferably the bot running.
    - Hint: show the output log in the video.
- Make it very clear what your extension(s) is(are) in the video.
    - Hint: if you go beyond my list, make it clear, and if you do consider researching "*end-to-end*" *automation* and discussing your bot/solution using this language.
- Discuss the solution in terms of efficiency (hours saved) and effectiveness (minimization of potential human errors, typos, mis pasting of data, etc).
    - Hint: Consider talking about other uses of time for Victoria and Skylar.
    - Hint: Another discussion point is the provision of follow up services, including maintenance and or help with other automations. You are welcome to discuss these hypotheticals.

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What can I automate?

Answer: Any repetitive process

- Does it have to be spreadsheets only? No, it can use any type of data.
- Can I automate software other than excel/csv files? Yes – these are often more impactful submissions.
- Can I build off the Skylar case? Yes (for the video version), if you extend or alter it in a significant way, but note this will limit what you can do relative to the order-to-cash process. (same for the original version, but use the new data as a starting point).
- Can I submit one of the legacy bots? Yes, if you extend or alter it in a significant way.
- Can I start from scratch using a completely new process? Yes!

Bot Requirements

Required deliverable: A software deliverable of a desktop-automation level automation bot using UIPath or another automation software.

- Each individual will be asked to develop a desktop-automation level automation robot of a common repetitive business task. The bot is to be built using either UIPath or the Microsoft Power Apps (or another automation software with approval from your instructor).
- The RPA solution is expected to work on a single desktop, and any issues related to the transfer of the bot need to be identified and discussed.
- Any files or other materials required in order to have the bot run (in most cases you will upload a zip file with your input, app, and output folders.

Suggestions & hints

- Choose a task that is rule-based, repetitive, and ideally takes at most 5 minutes per execution – this helps demonstrate meaningful efficiency gains.
- As a base case, a loop should include 3 items to loop through each case to demonstrate that the bot could loop through any number of iterations (three is plenty).
- You can generate the data input into the automation and if you need help generating data, please ask.
- Keep your folder structure clean and include a brief README file if additional setup is required for your bot to run (note this is uncommon, ask if unsure).
- If your bot requires specific file paths, applications, or screen resolutions, note these explicitly and suggest how they could be standardized for transferability (again this should be uncommon, ask if unsure).

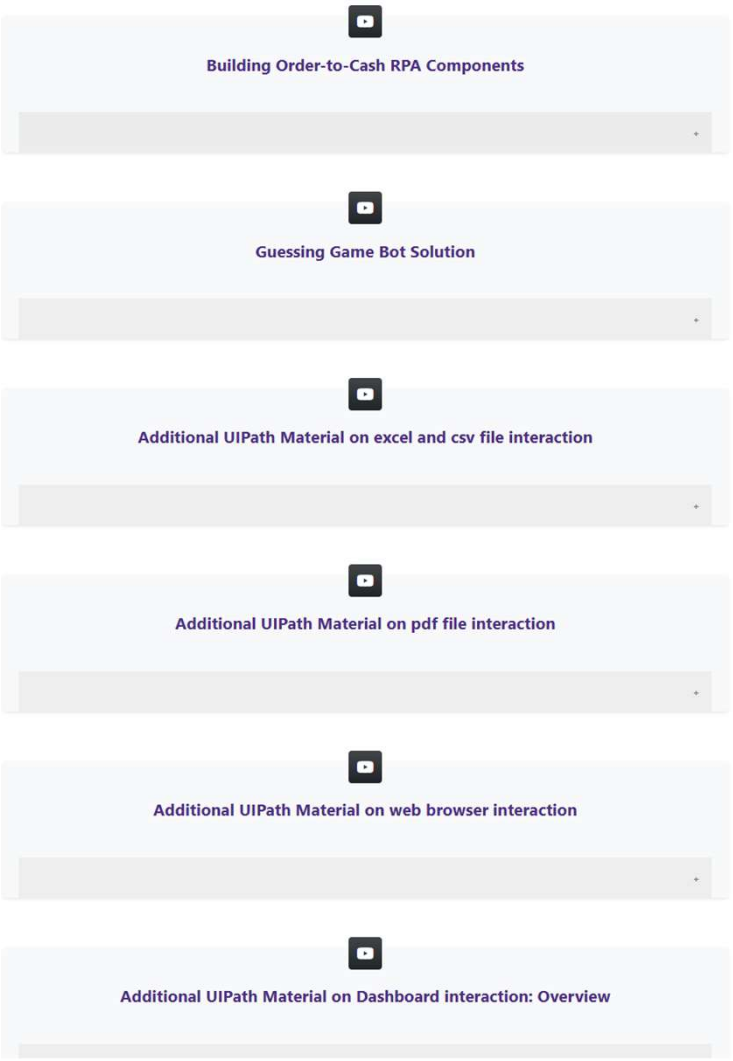
Resources

- **Case: Billing Bot (background) Case** as an example of extending the bot to capture invoicing.
- **Case: Tax Form Bot (background) Case** as an example of extending a bot from input data to interacting and saving pdfs forms.
- **Case: Distance Bot (background) Case** as an example of extending a bot using input data to interacting with web browsers and obtaining data from websites.
- **Case: Sales Reporting Bot (background) Case** as an example of extending a bot using sales data to interacting with dashboards to display sales information.

https://www.ashercurtis.me/teaching/courses/acctg528/class08.html

Video Resources

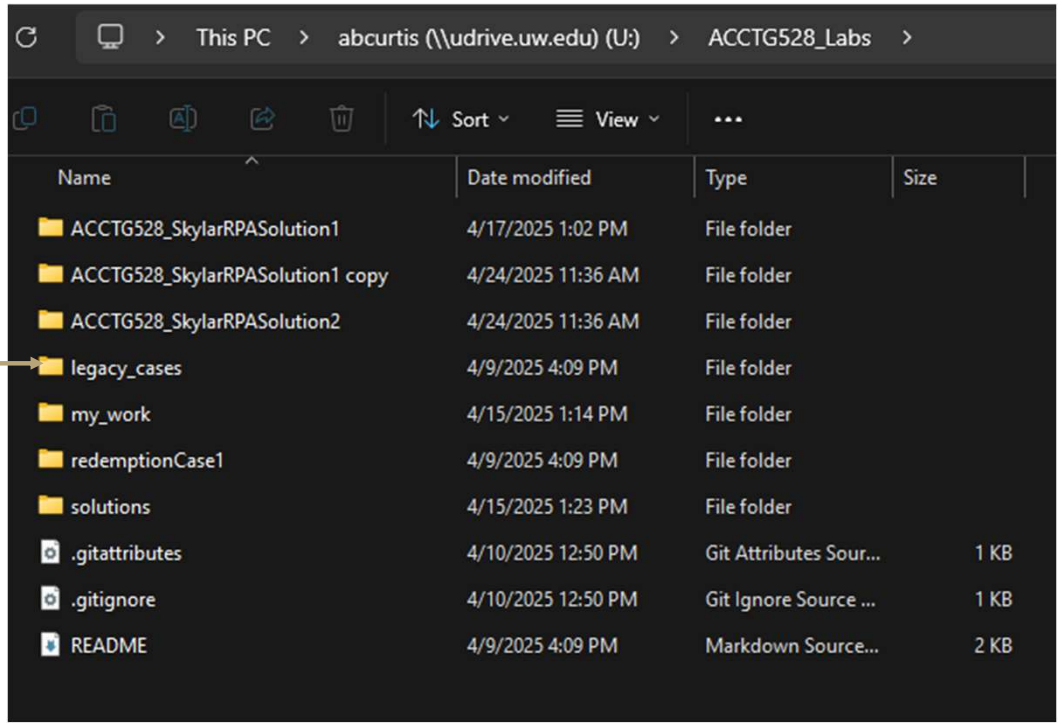
https://www.ashercurtis.me/teaching/courses/acctg528/videos.html



Starter files

Starter files for legacy cases

git pull



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Thank you

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