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## Vivit North East User Groups & Micro Focus: Robotic Process Automation – Beyond the Basics January 26, 2021



# Moderated By



**Joe Madden**

President

Greenlight Group

Vivit Local User Group Leader

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# Today's Speakers



**Joe Madden**  
President  
Greenlight Group



**Julio Arteaga**  
ADM Solution Architect  
Micro Focus



**Eric Fisher**  
Senior Solutions Architect  
Micro Focus



**Chris Munro**  
Solution Architect  
Greenlight Group

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# House Keeping

- This “LIVE” session is being recorded  
Recordings are available to all Vivit members
- Session Q&A:  
Please type questions in the Questions Pane

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# Webinar Control Panel

Toggle View Window  
between Full  
screen/window mode.

Questions



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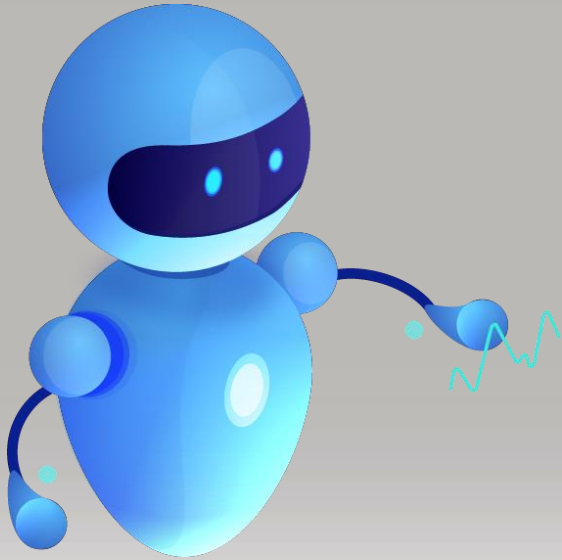
# Agenda

- Introduction
- What's New – RPA 2020.11
  - Overview
  - Demo
- What's New – UFT 15.0.1
- Tips & Tricks
  - UFT best practices
  - OO best practices
- Discuss Use Cases
  - Use case #1 in Bank – challenges
  - Use case #2 in On-Boarding – challenges

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# What's New RPA 2020.11



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**Robotic Process Automation (RPA) uses software robots that mimic UI-based human actions to automate everyday tasks.**

With Enterprise-class RPA —

- Record screen actions
- Design workflows to automate business processes
- Run 24x7, mission critical, with data protection and auditability





# Automate a Wide Range of Use Cases

RPA spans departments and verticals



## Accounting

Accounts payable and receivables (invoice and billing)

Payroll

Month-end reconciliation



## Compliance –Auditing

Compliance management

Internal auditing



## Customer Services

Contact center operations

Service requests



## Financial Services

Finance operations and reporting

Mortgage processing

Insurance (non-health)

Credit card processing



## HR

New hire onboarding

Candidate screening

Benefits administration



## IT

Password management– e.g. for legacy apps

Data replication and migration– e.g. across systems that cannot be connected



## Medical

Insurance (health)

Patient records and care handling



## Sales

Product catalog entry

Competitive intelligence and price monitoring

Sales operations, opportunity, and lead management

Order management and fulfillment

# What Makes Micro Focus RPA Stand out?



Ease of use

Empower users to **record, design, edit, and run automation with ease**

- Intuitive **visual low-code/no-code** design studio
- **Self-service** portal



Resilient robots

Identify **600+ UI objects** and **automatically adapt to UI changes** across SAP, terminal emulators, web, and Windows

- Robots **won't break** each time the UI changes
- Customers will spend **less time on maintenance** as a result



Powerful orchestration

Orchestrate the automation you need with highly capable robots

- Combines **API and UI** automation
- Offers **rich OOTB API content**
- Centrally coordinates the work of **multiple robots**
- Enables **advanced workflow logic**



Security

Run **business processes** with **secure robots**

- Integrates with a **Credential vault (PAM)**
- Enforces **encrypted, role-based credentials**
- Provides **detailed, real time activity logs**

Fast time to value and lower TCO

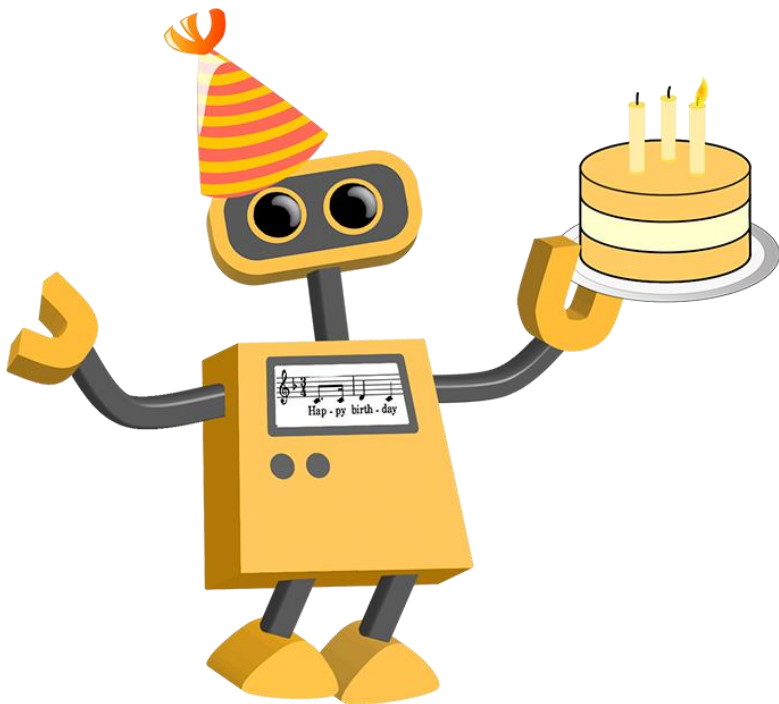


# What's new in 2020

# Happy Birthday RPA!

Introducing RPA 2020.11

Micro Focus RPA celebrates its 5<sup>th</sup> release!



- New license model addition
- AI, NLP, ML
- Brand new ROI Dashboard
- Attended Automation
- Assign or override worker groups per workflow
- Easy access to advanced filtering and code functions, without knowing code
- RPA Mobile Client
- New simplified installer for a single-server lab or trial installations

# New licensing model – Bot Hours

The screenshot displays the Micro Focus RPA Central interface. The top navigation bar includes 'RPA' and 'CENTRAL' tabs, with a user profile 'dre' and help icons. The main menu on the left lists 'Dashboard', 'Run Management', 'Content Management', and 'System Configuration'. The 'License' tab is active, showing '1,000 Concurrent RPA Bot Licenses' and '100 RPA Bot Hours Licenses'. A toggle switch for 'Set a Bot Hours license threshold' is set to 110. The 'System Configuration' section is highlighted in blue. The 'Flow Library' is visible, showing a tree structure of flows. The 'ssh\_flow' is selected, displaying its details: ID, Path, Content Pack, Version, Run Link, and Description. The 'Flow Run Settings' section includes dropdowns for Persistence Level, Timeout, Auto-resume, and Preserve session, along with a 'Save' button. The 'Permissions' section shows a table of roles and their permissions for the selected flow.

**Choose different license types for each workflow**

Role Name	View	Run
ADMINISTRATOR	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PROMOTER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

# Micro Focus RPA AI capabilities

1

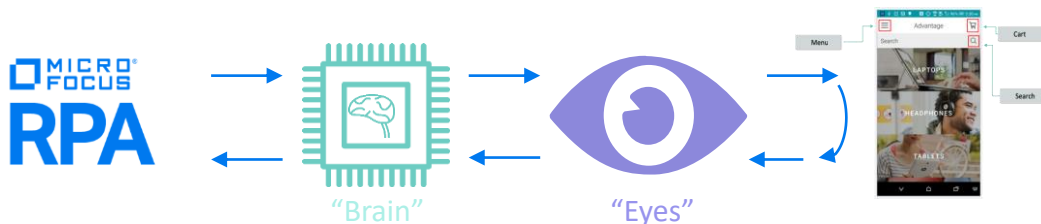
**Identify** objects the same way as a human does

Computer Vision

2

**Interact & manipulate** objects naturally

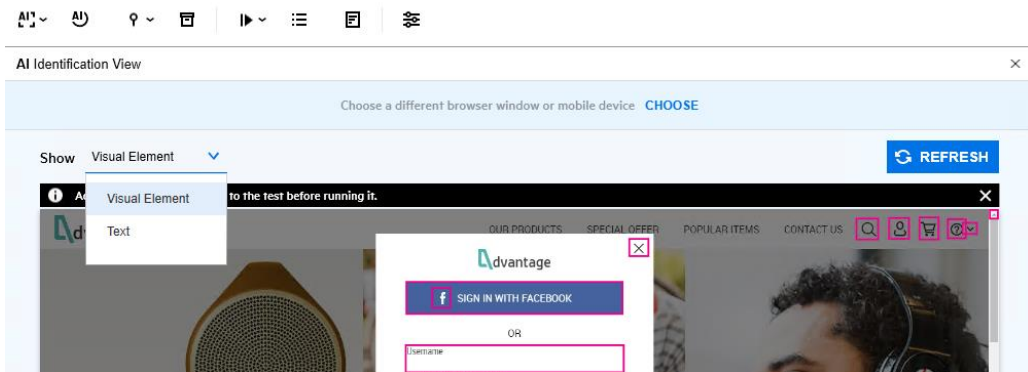
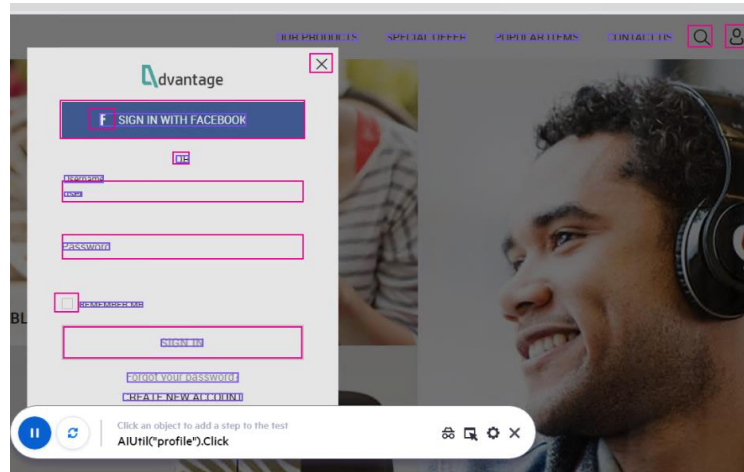
Neural Networks



Roadmaps are subject to change and are therefore not a commitment to deliver a software product, code or functionality or to meet any specific timetable.

# New AI capabilities for Recording/Inspecting in Activity Designer

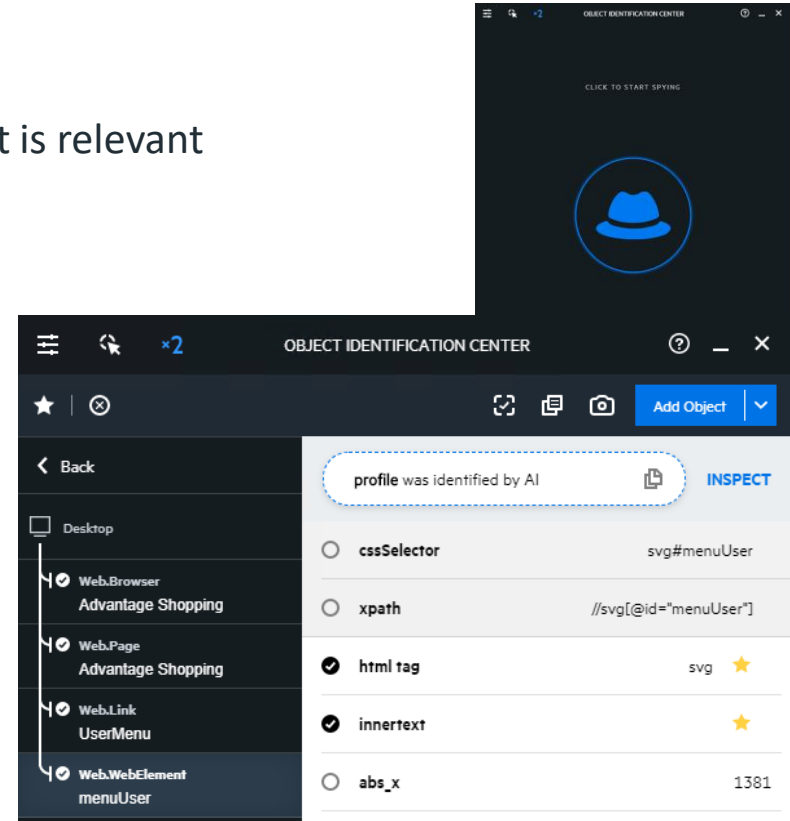
- New AI Inspect & AI Record Feature
- Uses OCR for textual blocks
- Uses ML + Computer Vision for visual elements
- Enables building technology agnostic activities
- Makes activities more intuitive, easier to maintain
- Improves OOTB resiliency





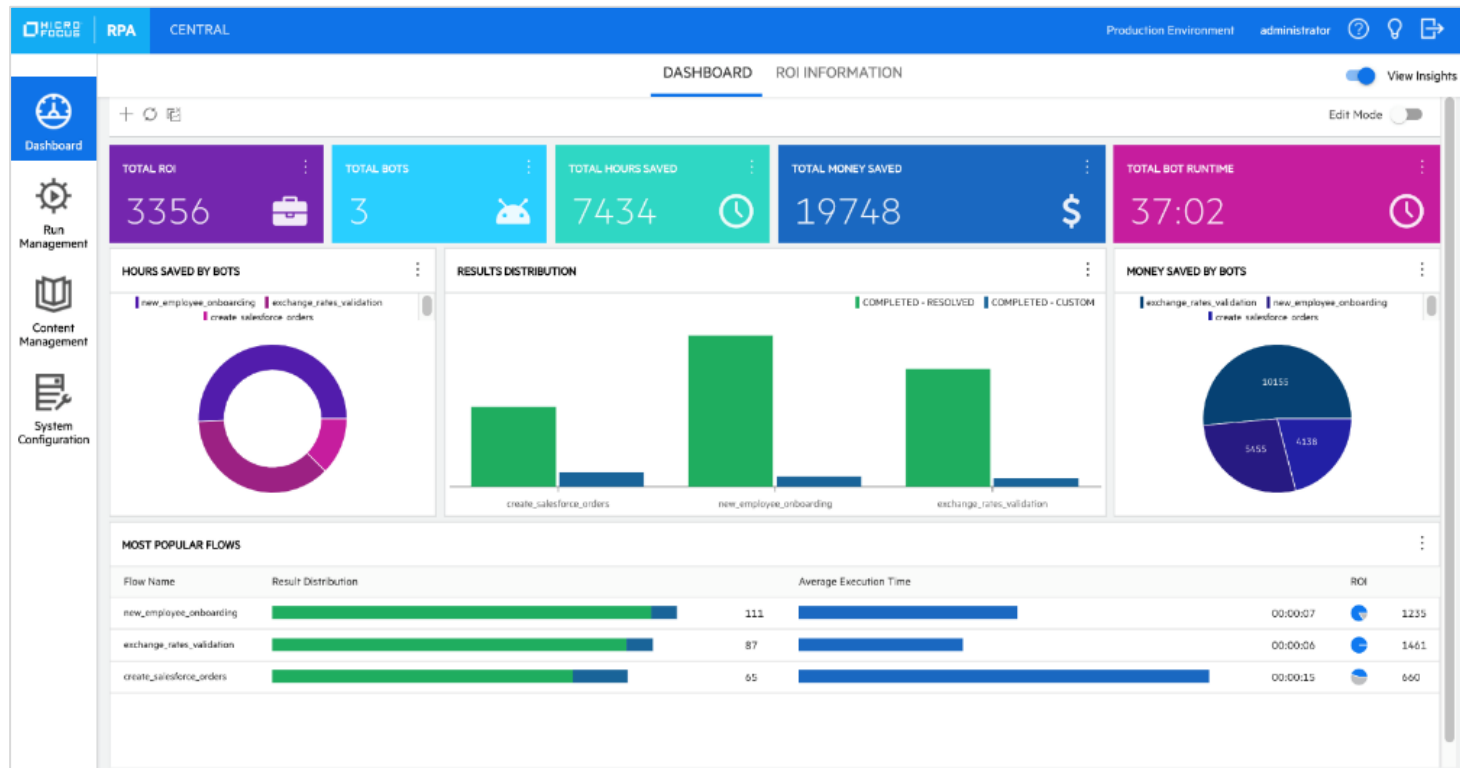
# RPA fledged Activity Designer and New Object Spy

- Menus & Features curated to only focus on what is relevant
- Brand new Object Identification Center
  - Intuitive modern interface
  - Simplifies spying for objects
  - Allows detecting multiple objects in 1 session
  - Suggests AI identified alternatives where possible



# Central ROI Dashboard

Display runtime metrics and savings in time and money



# Human-in-the-Loop

RPA workflow seeks human intervention when action is required

The screenshot displays an RPA workflow interface for a process named 'provision\_environment'. The workflow is currently paused at the 'provision\_decision' step, indicated by a 'Paused - Action Required' status bar in the top right. A callout box on the left prompts the user to 'Take a decision'. The 'Step Details' panel for 'provision\_decision' shows the following information:

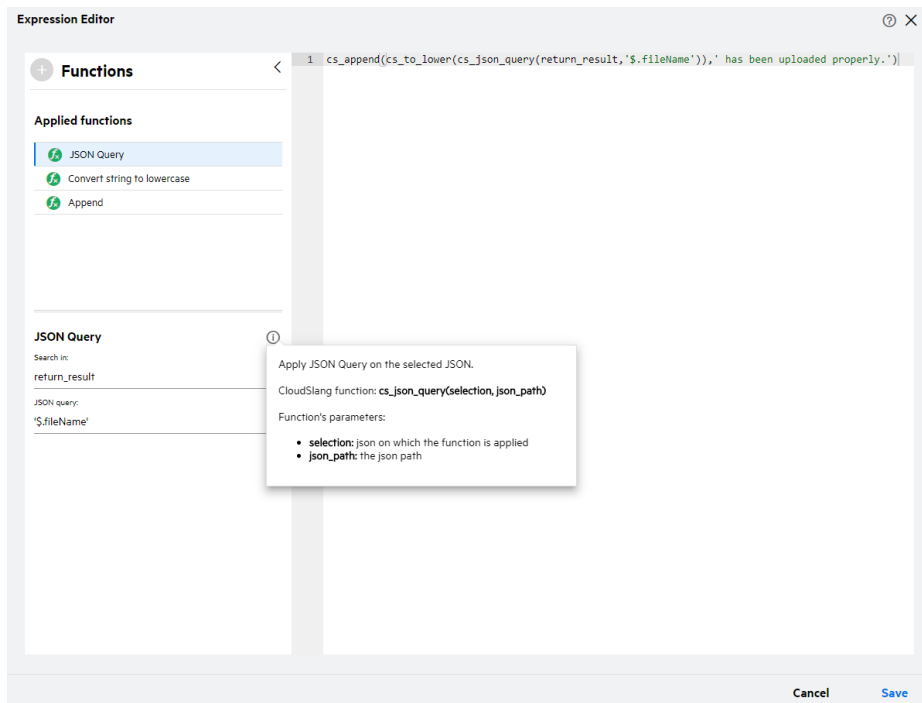
Property	Value
Run ID:	190300172
Step ID:	provision_decision
Start Time:	11:45:30 AM
End Time:	N/A
Response:	N/A
Duration:	0 seconds
Primary Result:	N/A
Worker Group:	N/A
Worker ID:	N/A
Transition Message:	
Step Persistence:	Detailed

An 'Inputs Required - provision\_decision' dialog is open, showing the following inputs:

- decision:** \* delegate (Decision to stop, delegate, let system assess and continue)
- details:** \* exceeds department budget (Provide details regarding the decision)
- notify:** \* john.doe@email.com (Notify other stakeholders (list of email addresses))

A 'RESUME' button is located at the bottom right of the dialog.

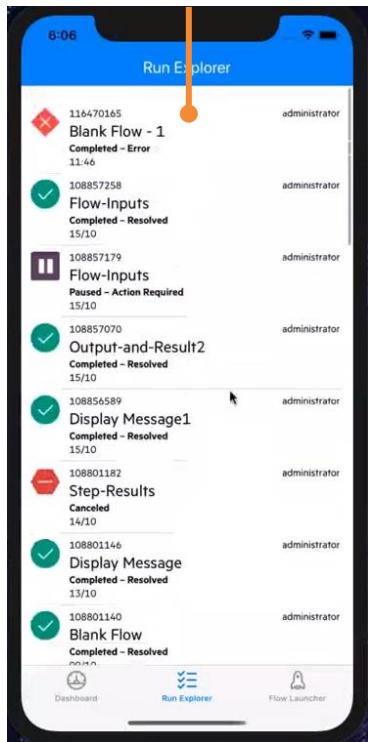
# OOTB Filters in Workflow Designer



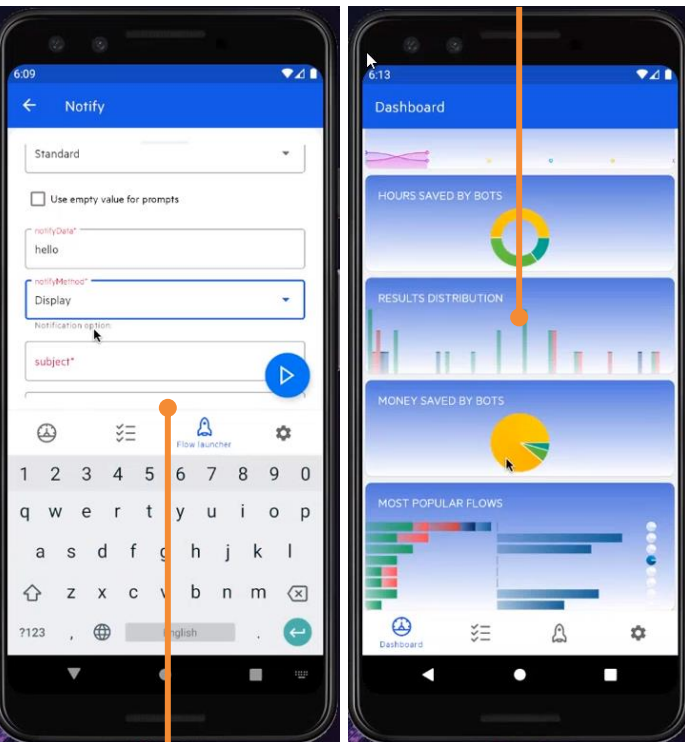
- 11 out of the box functions added (XPath Query, JSON Query and others)
- Ability to parse data in a graphical manner
- Ability to parse data in hybrid mode (function and code)

# RPA Mobile Client

Launch and view the status of robot workflows even when you are away from your desk.

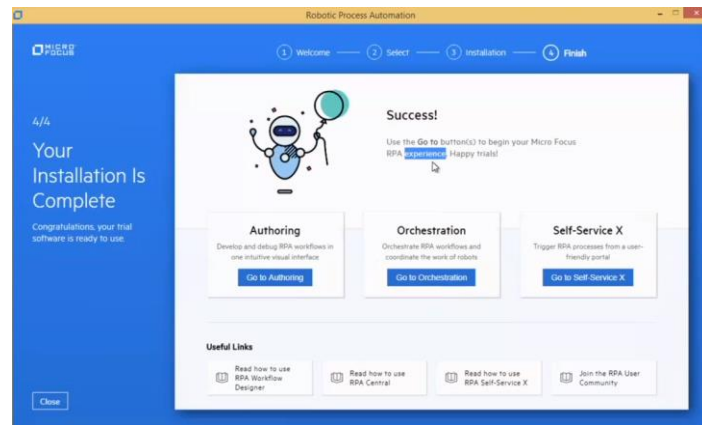
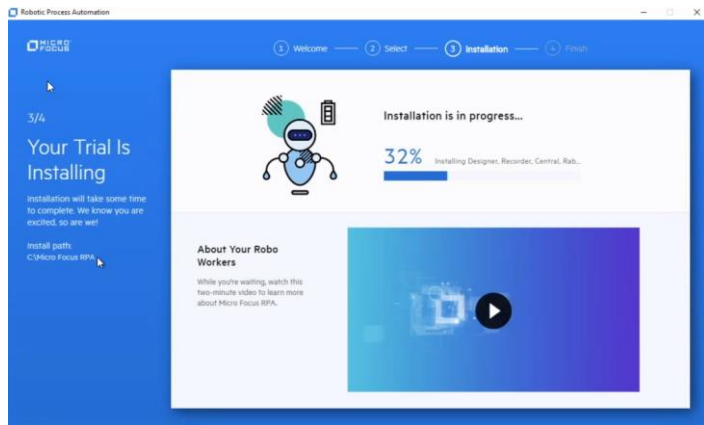
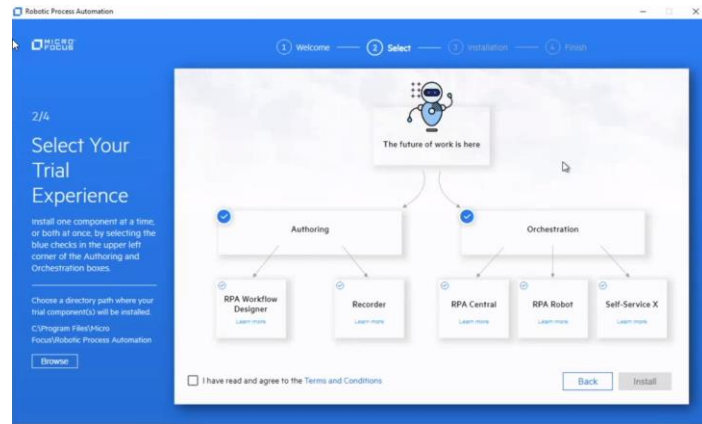
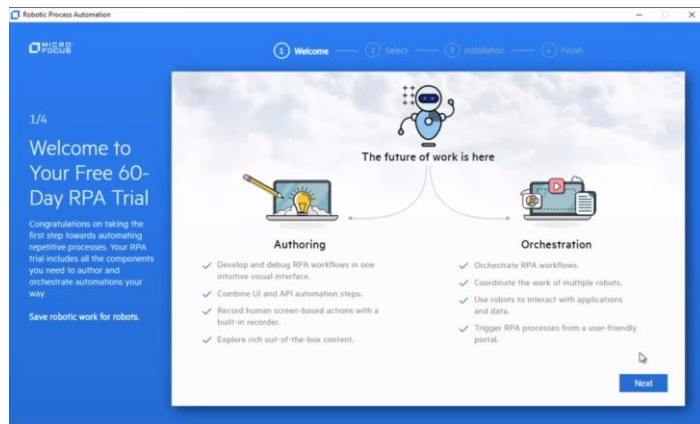


View Return-on-Investment (ROI) insights for one or all the processes across your organization.



Respond to prompted requests directly from the robot to keep the process moving forward

# Simplified Installer



# How Micro Focus RPA Works



**Recorder**

Record screen-based  
human actions



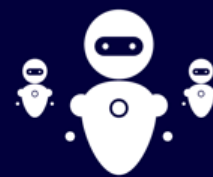
**Designer**

Design and maintain  
RPA workflows



**Orchestrator**

Manage and  
monitor RPA  
workflows



**Robot**

Interact with  
applications and  
data



# Quick Demo

# What's New UFT One

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# Micro Focus UFT Focus Areas

*Test at scale and within the tool of choice to deliver business impact with a seamless UX*

## Resiliency

---

Create once - let automation and intelligence overcome application changes

## Efficiency

---

Break the skills barrier and leverage the best tools for the user

## Scalability

---

Reduce waiting times and streamline costs with anytime, anywhere test environments



# What's New in UFT One 15.0

Features and enhancements available from UFT One's release in November 2019



## AI-based Enhancements

Intelligently-powered to identify mobile and mobile web objects the way humans do



## Fresh New UI Design

Brand-new toolbar, main menu, as well as a redesigned Start page



## New Data Table

Supports Excel's .XLSX format for UI tests and provides faster response times



## UFT on Hyper-V

Scale test assets accordingly — spin-up multiple Hyper-V instances running UFT One



## Azure DevOps Server

Leverage Microsoft's CI/CD tool to trigger tests from UFT One's local file system or from ALM



## Usability Enhancements

Ease-of-use for high-volume activities and critical testing processes



## Technology Improvements

Expanding testability across diverse technology stacks—including Java, Web, Mobile, API, and SAP



## Safari App Extension

New and improved UFT Agent that supports replay and spy on the latest Apple Safari browser



## Support Matrix

Newly supported browser versions, embedded frameworks, application technologies, and more

# What's New in UFT One 15.0.1

Latest features and enhancements available from UFT One's release in April 2020



## AI-based Enhancements

Revolutionized and intelligently-powered to identify web-based objects the way humans do



## Dark Theme

Enhanced legibility and readability with an aesthetically darker IDE that's friendlier on your eyes



## Cloud OCR and ABBYY Update

Record and run OCR-based objects with a higher level of accuracy



## Microsoft Chromium Edge

Introducing Microsoft's latest browser reboot, built on Google's open-source Chromium project



## Dynamic Add-in Loading

Replay your tests seamlessly without having to go back and tell UFT One which add-in to use



## Docker Containers for API Testing

Run API tests on lightweight execution environments to speed up your test time



## Technology & Usability Enhancements

Expanding testability across diverse technology stacks—including Java, Oracle, Web, and Mobile



## SAP Web Testing on Chrome\*

Choose whether to support your SAP tests on IE or Chrome without overhauling your scripts



## Support Matrix

Newly supported browser versions, embedded frameworks, application technologies, and more

\* Feature/enhancement available as tech preview

# Resiliency

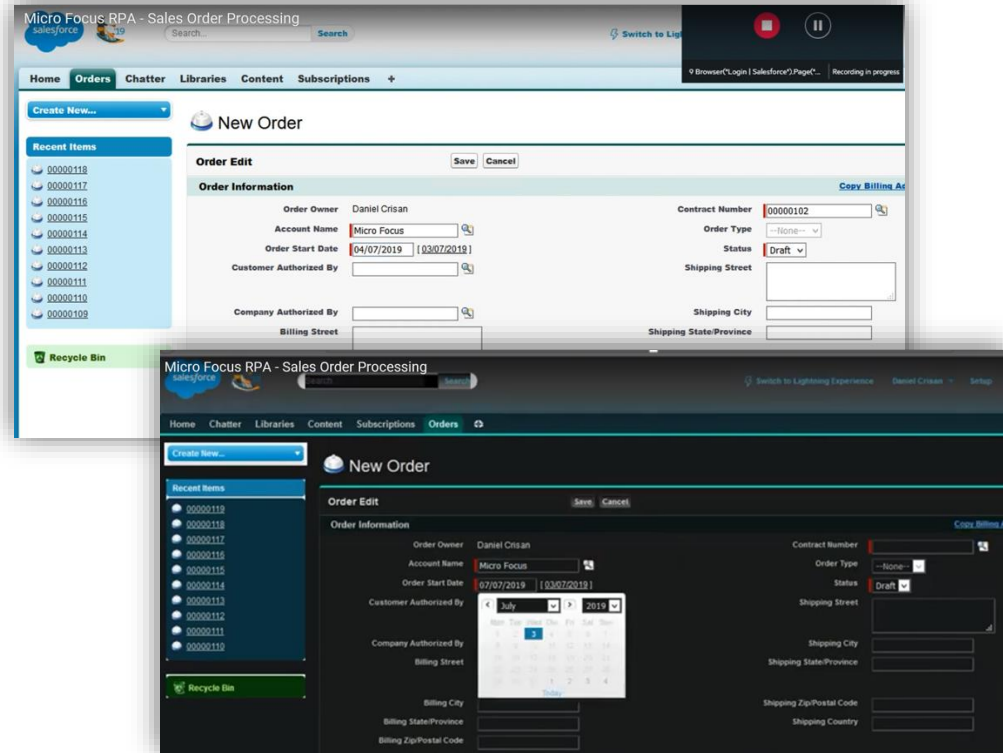
Spend less time on maintenance

## Current challenges

- Changes to production systems happen frequently and can cause automation to break
- Documenting updates to the numerous systems in use, re-recording automated UI scenarios, and training staff on changes and updates is time consuming

## Micro Focus UFT can

- Deliver the software components that automate the steps in a workflow – that can identify over 600 UI objects across SAP, terminal emulators, web, Windows, and more
- Adapt bots automatically to UI changes using advanced object recognition



# Tips & Tricks – UFT Best Practices

- Leverage modular design - shared assets, function libraries
- Build with resiliency in mind – Advanced object identification

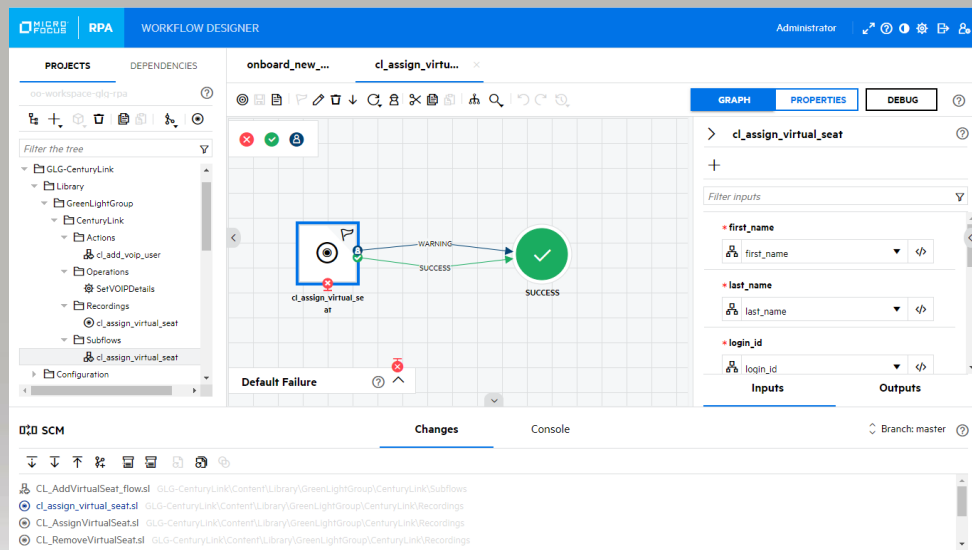
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# Tips & Tricks – OO Best Practices

## Maintaining projects with multiple authors using Designer



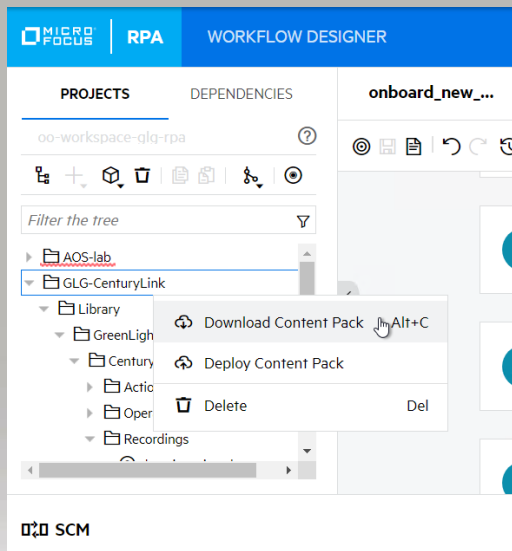
- **Consistent project structure**  
Actions, Operations, Recordings, Subflows
- **One recording, One Flow**  
Capture all inputs/parameters
- **SCM, SCM, SCM**  
Fetch to begin, push/commit often

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# Tips & Tricks – OO Best Practices

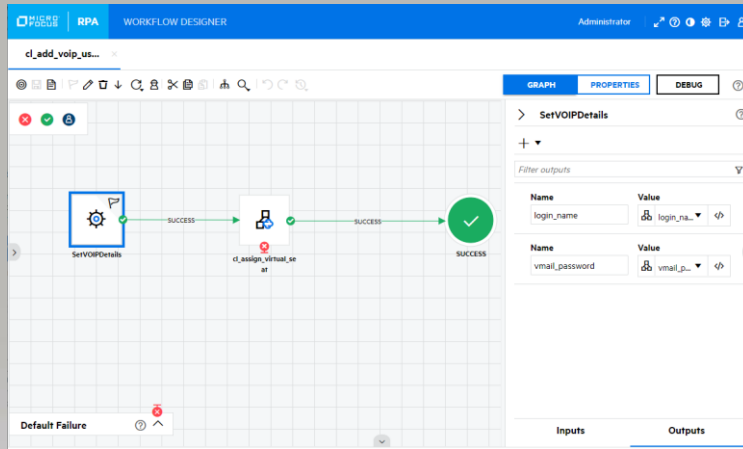
## Development lifecycle: Working with multiple instances of RPA Content Packs or SCM



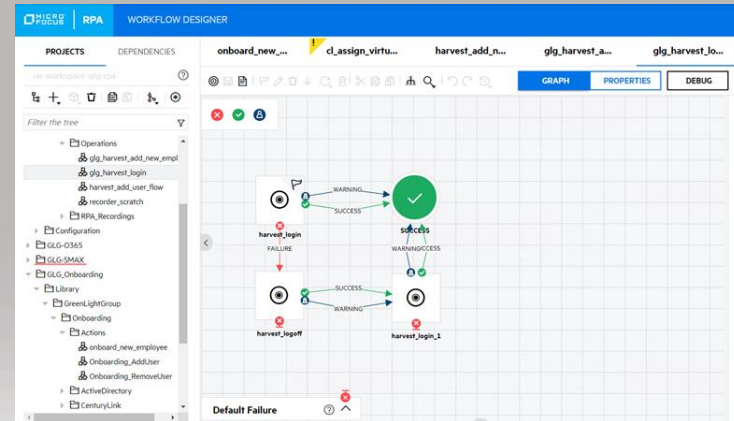
- **Artifacts do not sync**  
UFT recordings not in git, only YAML
- **Content Versions**  
Artifact versions must match content
- **Design in DEV, Deploy to PROD**  
Single Designer, deploy content to multiple environments

# Tips & Tricks – OO Best Practices

## Modular design concepts



- Complex recording, or chain operations?
- Separate recording, or scripted actions?
- Python operation, or Expression as input?



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# Tips & Tricks – OO Best Practices

## Differences between legacy OO studio and Designer

The screenshot displays the Vivit Workflow Designer interface. On the left, a 'PROJECTS' pane shows a tree structure with folders like 'Configuration', 'GLG-Harvest', 'GLG-O365', 'GLG-SMAX', 'GLG-Onboarding', and 'Library'. The 'Library' folder is expanded, showing 'GreenLightGroup' and 'Onboarding' subfolders. The 'Onboarding' folder contains 'Actions' and 'onboard\_new\_employee'. The main workspace shows a workflow graph for 'onboard\_new\_employee'. The 'Inputs' tab is active, displaying a table with input fields and their properties.

Name	Default Value	Private	Sensitive	Required	Description
first_name	[C] 'Leonardo'			✓	
last_name	[C] 'Da Vinci'			✓	
title	[C] 'Engineer'			✓	
office_number	[C] '8018901259'			✓	
voip_extension	[C] '1259'			✓	
mobile_number	[C] '555-123-45...			✓	
email_address	[C] 'jcthepcguy@...			✓	
department	[C] 'IT Service Ma...			✓	
billing_department	[C] 'Engineering'			✓	

On the right, a 'DEBUG' pane shows a list of steps in the workflow, including 'onboard\_new\_employee (3m 58s)', 'SetupO365 (1m 1s)', 'O365\_add\_standard\_user\_flow', 'O365\_add\_standard\_user (1m 47s)', 'cl\_add\_voip\_user (1m 47s)', 'SetVoIPDetails (0.587s)', 'cl\_assign\_virtual\_seat (1m 46s)', 'cl\_assign\_virtual\_seat (1m 46s)', 'SetupHarvest (1m 5s)', 'harvest\_add\_user\_flow (1m 4s)', 'harvest\_add\_user (1m 4s)', 'onboarding\_request\_sonitrol\_co...', 'send\_mail (3.904s)', and 'SUCCESS'.

- **Inputs / Outputs**

Assign From / Assign To  
Filters on Outputs

- **DEBUG**

Prompt for input  
Remote execution

- **Language**

XML to YAML  
Javascript to Python

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# Tips & Tricks – OO Best Practices

## How to run Recorder

The screenshot shows the RPA Workflow Designer interface. The central workspace displays the 'Properties' tab for an action named 'GreenLightGroup.Onboarding.Actions.onboard\_new\_employee'. Below the action name is a table with columns: Name, Default Value, Private, Sensitive, Required, and Description.

Name	Default Value	Private	Sensitive	Required	Description
first_name	[C] 'Leonardo'			✓	
last_name	[C] 'Da Vinci'			✓	
title	[C] 'Engineer'			✓	
office_number	[C] '8018901259'			✓	
voip_extension	[C] '1259'			✓	

The right sidebar shows a debug console with a list of steps and their execution times, including 'onboard\_new\_employee (3m 58s)', 'Setup0365 (1m 1s)', 'O365\_add\_standard\_user\_flow (1m 0s)', 'O365\_add\_standard\_user (1m 0s)', 'cl\_add\_voip\_user (1m 47s)', 'SetVOIPDetails (0.587s)', 'cl\_assign\_virtual\_seat (1m 46s)', 'cl\_assign\_virtual\_seat (1m 45s)', 'SetupHarvest (1m 5s)', 'harvest\_add\_user\_flow (1m 4s)', 'harvest\_add\_user (1m 4s)', 'onboarding\_request\_sonitrol\_co (4.41s)', 'send\_mail (3.904s)', and 'SUCCESS'.

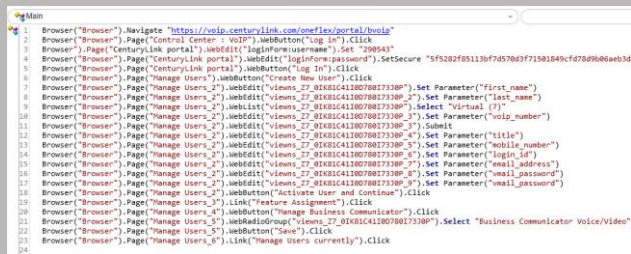
- **RPA Designer**  
Google Chrome – Incognito
- **Run/Record Settings**  
Google Chrome  
New Browser  
about:blank

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# Tips & Tricks – OO Best Practices

## Stablizing RPA Replay

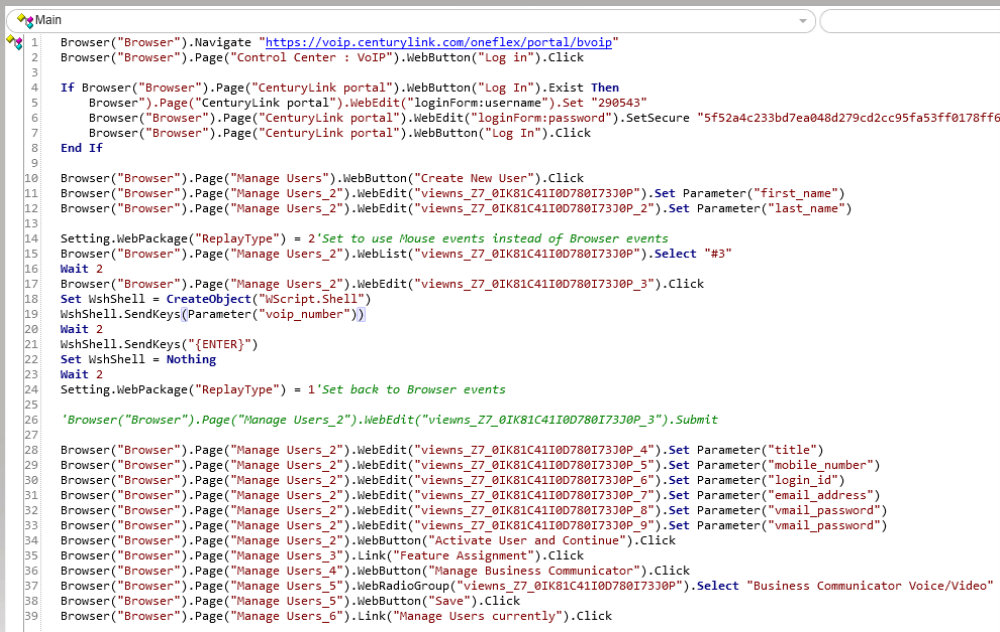


- **RPA Recorder**

Initial recording

- **Activity Designer**

Refine for replay



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# Use Case #1– Banking

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# Bank automates end-to-end process for updating mortgage accounts on age-old legacy app

## Challenge

- Inefficient process
- Slow response time to requests from the business and customers
- Errors associated with manual processes
- Invested \$M+ in automation with no return.



## Benefits – first 2 business processes



First 2 months: 15,000 loan variations processed



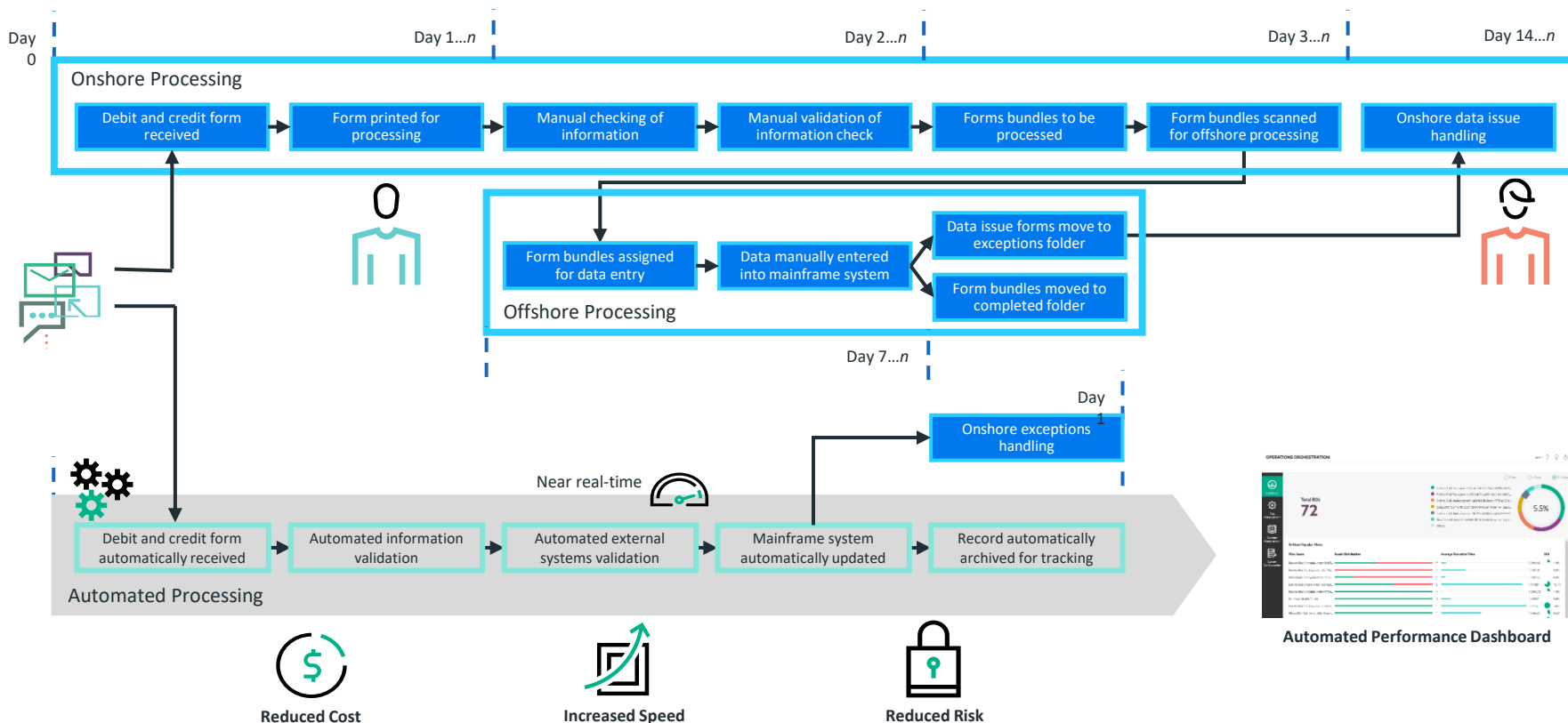
Over 1 year: 120,000 days saved in customer wait time



11,800 hours of manual processing saved

# How is RPA used to solve banking processes?

Australian Bank Example – debit credit manual processing to future state of automation



# Use Case #2 – Onboarding

## Evolve Automation

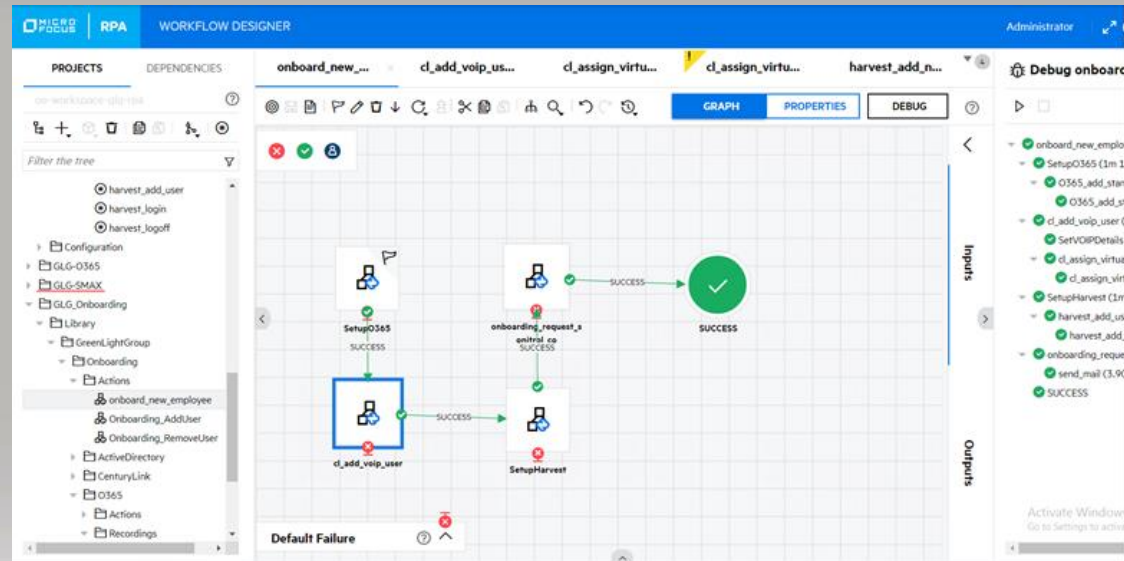
- **Scope of coverage**
- **Depth of coverage**
  - Self Service v SMAX
  - Running out of licenses
  - Compliance

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# Use Case #2 – Onboarding

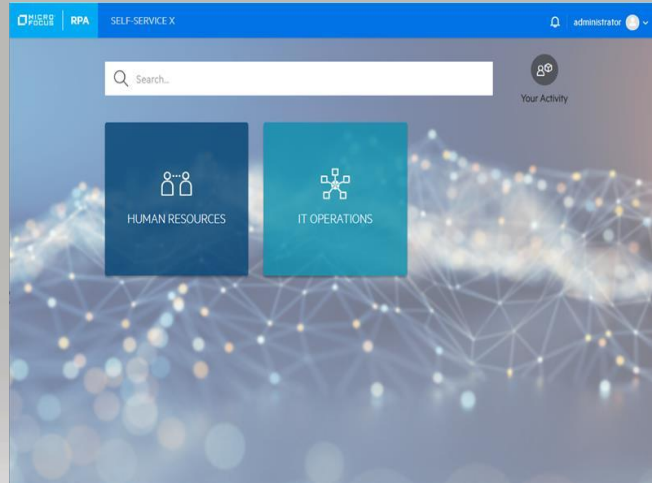
## Evolve Automation - Scope of coverage



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# Use Case #2 – Onboarding

## Evolve Automation – Depth of Coverage

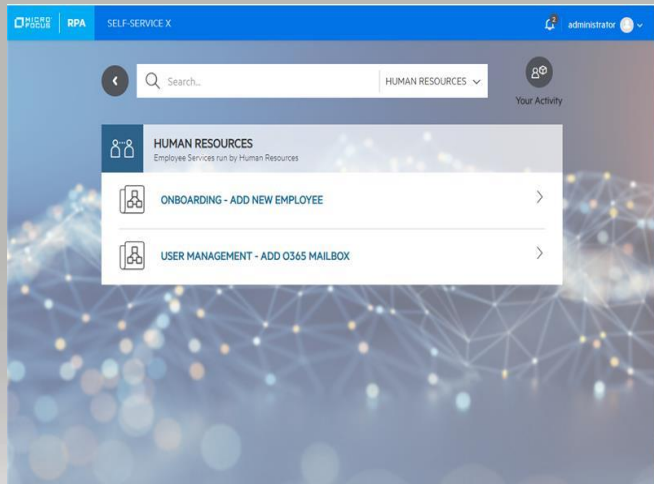


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# Use Case #2 – Onboarding

## Evolve Automation – Depth of Coverage

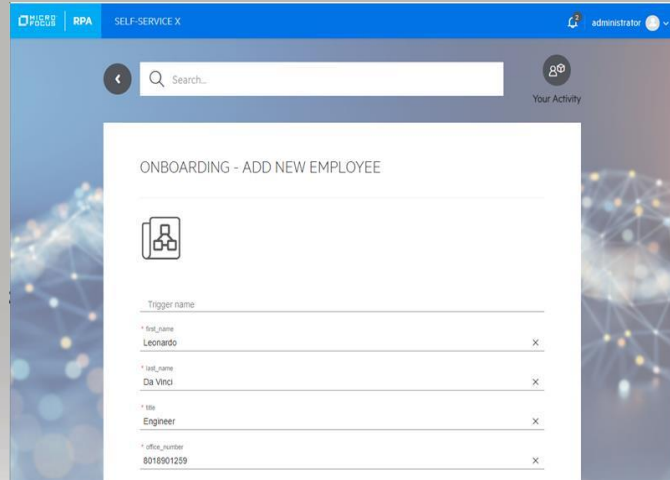


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# Use Case #2 – Onboarding

## Evolve Automation – Depth of Coverage



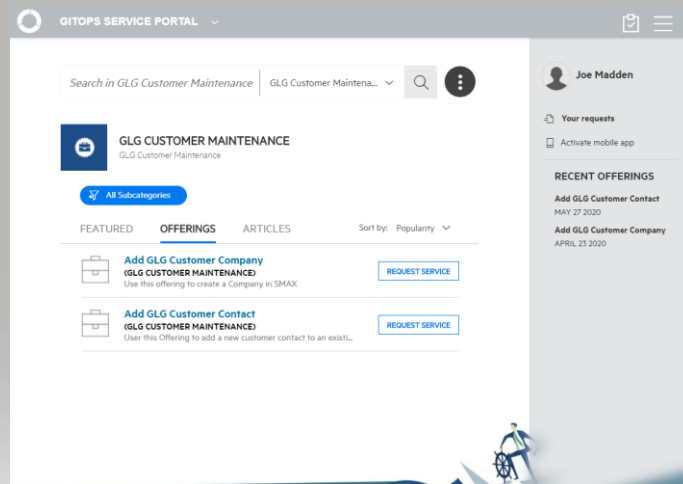
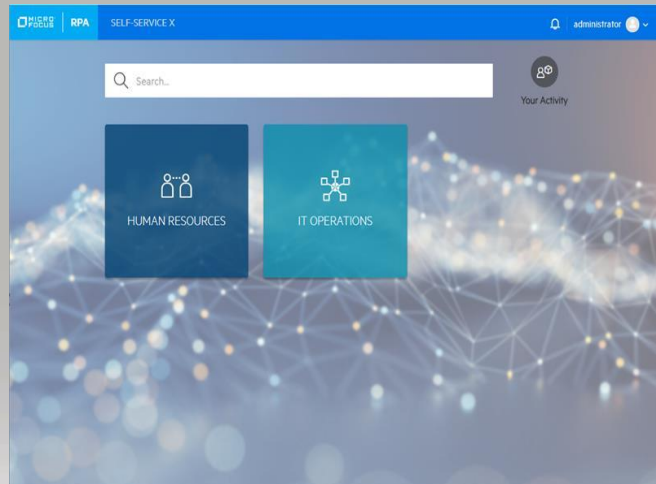
The screenshot shows a web application interface for onboarding a new employee. The top navigation bar is blue and contains the text "RPA SELF-SERVICE X" and a user profile icon labeled "administrator". Below the navigation bar is a search bar with a magnifying glass icon and the text "Search...". To the right of the search bar is a circular icon with a person silhouette and the text "Your Activity". The main content area is titled "ONBOARDING - ADD NEW EMPLOYEE" and features a form with several input fields. The form includes a "Trigger name" field, a "First name" field with the value "Leonardo", a "Last name" field with the value "Da Vinci", a "Title" field with the value "Engineer", and an "Office number" field with the value "8018901259". Each input field has a small "x" icon to its right, likely for clearing the field. The background of the interface is a light blue gradient with a network diagram pattern.

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# Use Case #2 – Onboarding

## Evolve Automation – Depth of Coverage



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# Use Case #2 – Onboarding

## Evolve Automation

- Scope of coverage
- Depth of coverage
  - Self Service v SMAX
  - **Running out of licenses**
  - Compliance

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# Use Case #2 – Onboarding

## Evolve Automation

- Scope of coverage
- Depth of coverage
  - Self Service v SMAX
  - Running out of licenses
  - **Compliance**

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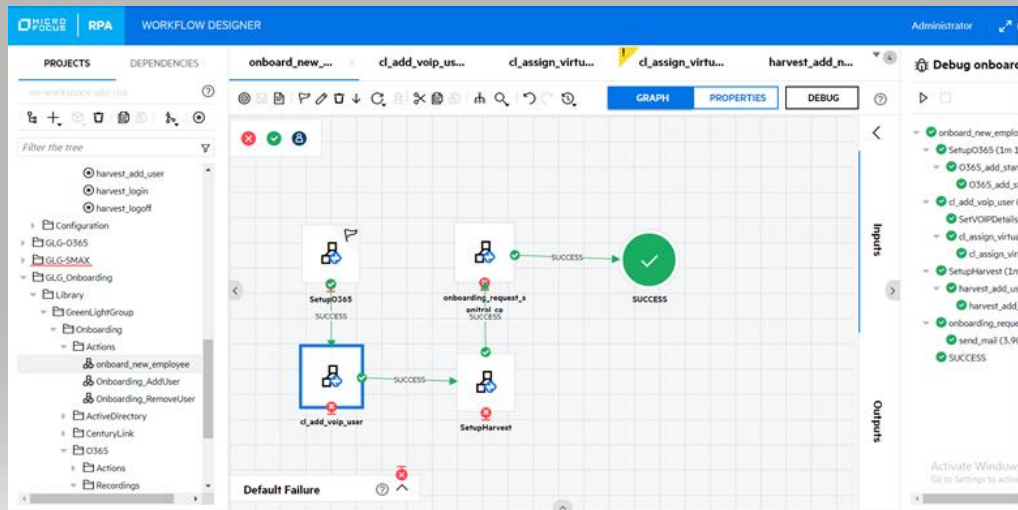
# Use Case #2 – Onboarding

## Expect Changes

- MS Teams => JoinMe
- 0365 fields/service name changes

# Use Case #2 – Onboarding

Expect Changes - MS Teams => JoinMe



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# Use Case #2 – Onboarding

## Expect Changes

- MS Teams => JoinMe
- 0365 fields/service name changes

# Questions & Answers

**Please type your questions in the questions pane.**

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# VIRTUAL COMMUNITY DAYS

Agile, DevOps and Testing



**ON-DEMAND  
RECORDINGS**

**NOW  
AVAILABLE**

[www.vivit-worldwide.org](http://www.vivit-worldwide.org)

# Thank you

This event has been recorded and the link will be sent to you within the next few days. Please complete the survey as you exit the event so we can better serve you in the future.

Within 24-48 hours of validation, you will receive a code via email to redeem your dining card

For more information, contact:

Joe Madden at [joe@greenlightgroup.com](mailto:joe@greenlightgroup.com)

Chris Munro at [chris@greenlight.com](mailto:chris@greenlight.com)

Julio Arteaga at [julio.arteaga@microfocus.com](mailto:julio.arteaga@microfocus.com)

Eric Fisher at [Eric.Fisher@microfocus.com](mailto:Eric.Fisher@microfocus.com)

Micro Focus Community Site:

<https://community.microfocus.com/t5/Robotic-Process-Automation/ct-p/Robotic>

Vivit: [www.vivit-worldwide.org](http://www.vivit-worldwide.org)

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