

# Global Financial Powerhouse: Secure, Compliant & Transparent RPA that Scales



## PROFILE ORGANIZATION

This U.S. multinational investment bank and financial services company headquartered in New York City has more than \$2.5 trillion in assets and employs 250,000 people around the world.

## CHALLENGE

The firm faced three distinct challenges with its RPA deployment:

- **Regulatory compliance** was an enormous issue because of the complex and diverse regulations it encountered throughout all the different regions it operated in around the world.
- **Role-based access control** was needed because individual users—including developers, business users, and production workers—had different needs and required different levels of access.
- **Management of the bot lifecycle** was also a challenge as the firm transitioned from basic RPA, to machine learning and optical character recognition (OCR) technologies were complex and required substantial planning and oversight.

## SOLUTION

Bot Insight from Automation Anywhere proved to be right solution. By providing visibility into what, exactly, each bot did, it gave the firm the oversight it required to meet all the international, national, and regional regulatory issues it faced. Bot Insight also allowed the firm to create role-based access controls for each category of user, and gave the firm visibility into the overall bot lifecycle, into both data in motion and data at rest, to enable it to perform strategic planning.

## BENEFITS

1,000+

Bots in production

92%

Reduction in time to add new accounts into the system

Processes Automated

• **Customer service**

Industry

**Financial services**

“Without Bot Insight, we’d lack the transparency we required to meet compliance mandates from around the world.”

— Executive director and technology, head of the corporate and investment bank robotics program

## DETAILS

In addition to its security and compliance requirements, the financial services firm had other critical needs.

For example, the RPA platform and analytics solution it deployed had to support a very diverse set of software and tools—legacy mainframe technologies as well as newer microservices-based applications. The bot framework had to use metabots to be reusable throughout global operations as needed. The system had to scale horizontally. And it had to be fault tolerant so that it was always available.

The firm's roadmap for deploying RPA was a progressive adoption of an increasingly sophisticated toolset. It started with basic RPA (from Automation Anywhere). Then that basic RPA had to be integrated with add-on solutions such as a mainframe emulator plugins, integrated monitoring solutions, Citrix virtualization technology, OCR technology, and spreadsheet management. The next phase was to add machine learning, where assistant bots for intelligent decision-making and chat bots to help customers could be deployed. Finally, with advanced cognitive automation, the RPA software would be integrated with software from partners such as IBM, Wipro, and Mphasis. It did all this using the Agile development methodology.

“Role-based access control was essential to our ability to keep our data safe and private, and to be in compliance with regulations. Bot Insight gave us that.”

— Executive director and technology, head of the corporate and investment bank robotics program

### About Automation Anywhere

Automation Anywhere empowers people whose ideas, thought and focus make the companies they work for great. We deliver the world's most sophisticated Digital Workforce platform making work more human by automating business processes and liberating people.

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