



PegaWorldiNspire

JUNE 9-11, 2024 | LAS VEGAS

Building a Robust and Resilient Automation CoE at Navy Federal Credit Union

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Welcome!



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NFCU + Pega RPA: A Brief History



When it all began: 2019

We started with: Pega Robotics

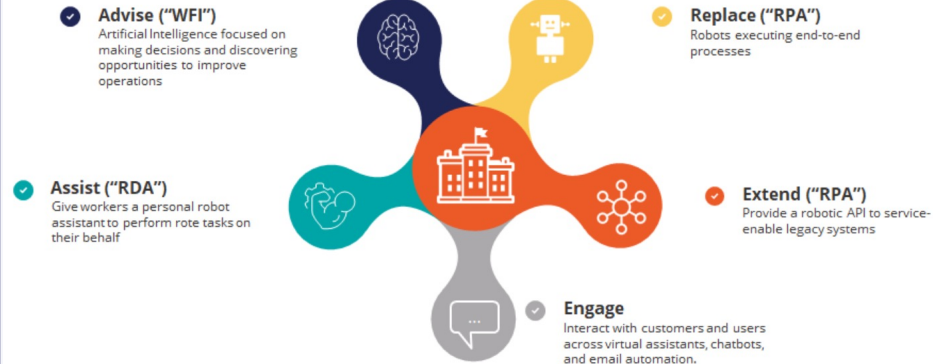
Where we are now: 18 Attended RPA solutions and 18 Unattended RPA solutions

Impact: Over 500,000 hours saved through robotics alone

Additional Technologies

WFI Deployment: Installed on over 15,000 user desktops

Pega Automation = Intelligent Robots @ Work
Across the enterprise in a unified platform.



"ACE"-ing the CoE

Development of the NFCU Automation Center of Excellence (ACE)

- **Establishment:** Initiated in 2018/operationalized in 2020
- **Purpose:** Oversees and guides all Pega development for both professional | and citizen developers

Functions and Responsibilities

- Mandatory checkpoints (intake scoring review, code reviews, etc.)
- Additional services (onboarding, creating reusable components, design patterns)
- Partners with internal Pega support and Level 3 support teams to create automated DevOps pipelines for all Pega apps

Identifying Robotics Use Cases



Key adapters:

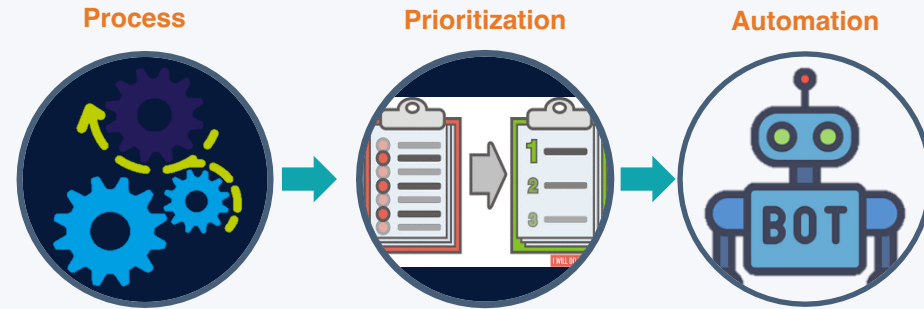
- Web and Windows applications
- 3270 Emulator

When do we choose robotics?

No APIs? Robotics steps in when there's no API support from vendor products or our internal legacy systems.

Two types of use cases:

- **RDA (Attended):** Perfect for tasks with a lot of switching between systems
- **RPA (Unattended):** Ideal for tasks that can run in the background



Design patterns

Attended and unattended RPA



Reuse at NFCU

Smart libraries

- Store common functions and procedures in asset libraries

Adapter level projects

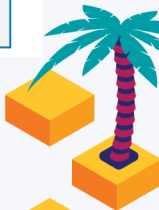
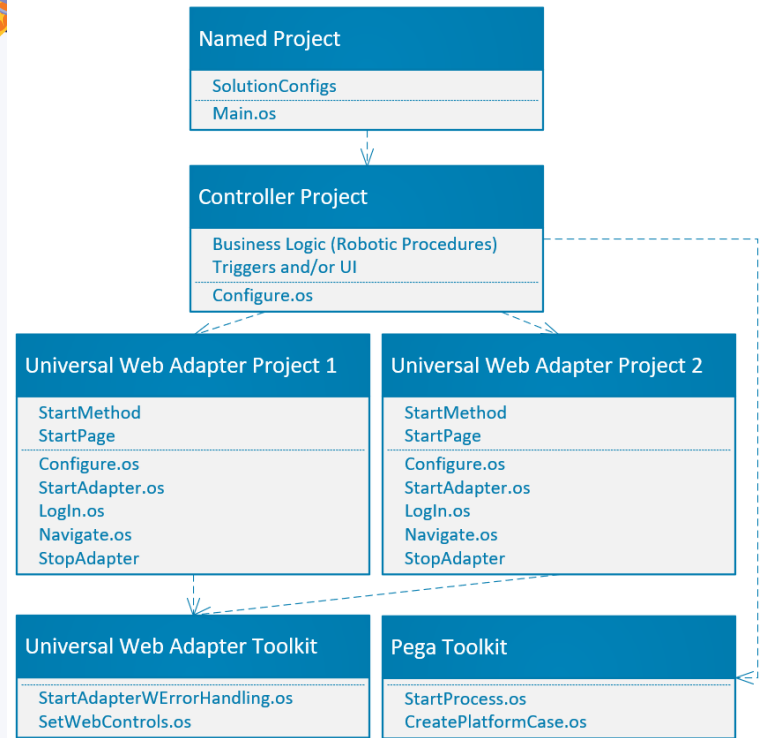
- Support shared functionalities for solutions interacting with the same applications

Version control

- Git-based repository with access controls

Controller projects

- Contain essential business logic and are designed for reuse



RPA as API Stand-in

Robotic management:

- Dedicated Pega instance with Robot Manager

Case setup:

- Clearly defined basic inputs and outputs
- Callback URL

Responsibilities:

- Assigned team member is responsible for planning a permanent solution

Attended RPA as Virtual Assistant

Versatile interfaces:

- Adapt to your needs: leverage the Pega Platform as a UI, utilize a custom UI, or no UI

Smart design:

- Keep all business logic in controller layer for easier reuse

When to use Attended RPA over APIs:

- Even with APIs, there are times when Attended RPA is preferred
- In these cases, our Attended RPA bots can step in to perform actions directly on the user's desktop

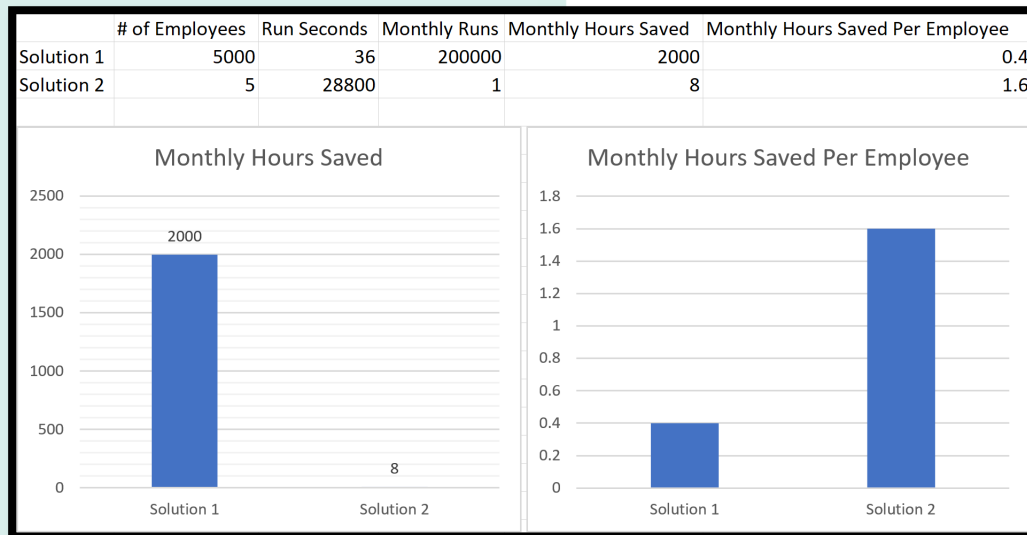
Considering the Impact on End Users When Measuring Value

Small processes with high volume

- Can increase ROI with large amounts of overall time savings, but may not have much impact on the end users

Low volume but high impact

- May not look great on the "hours saved" dashboard, but may have significant impact on users



What sessions to watch next



Make the most of your PegaWorld experience



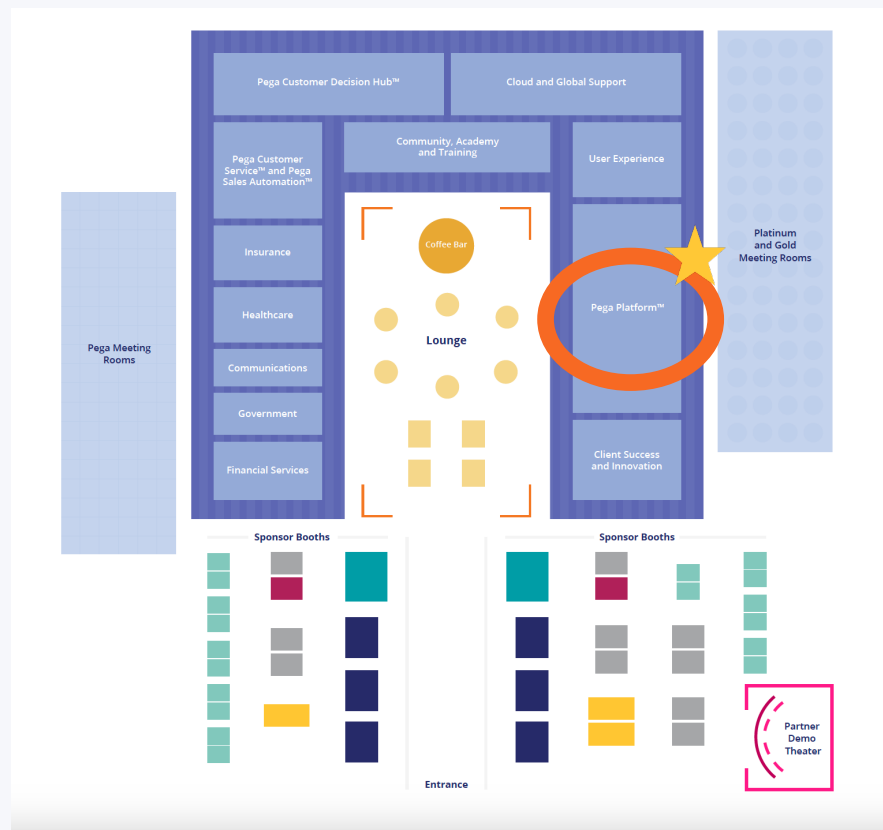
Don't miss these sessions!

Process Mining in Action: How Siemens Takes a Data-driven Approach to Process Optimization

Tues | 3:15-4:00 | Chairman's Ballroom 369

Personalization to Hyper-personalization: Navigating the Multi-channel Journey at Navy Federal

Tues | 3:15-4:00 | Premier Ballroom 315





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