IEEE STANDARDS ASSOCIATION

IEEE Guide for Terms and Concepts in Intelligent Process Automation

IEEE Corporate Advisory Group (CAG)

Sponsored by the
IEEE-SA Board of Governors

IEEE
3 Park Avenue
New York, NY 10016-5997
USA

IEEE Std 2755™-2017

IEEE Guide for Terms and Concepts in Intelligent Process Automation

Sponsor

IEEE-SA Board of Governors
of the
IEEE Corporate Advisory Group (CAG)

Approved 14 June 2017

IEEE-SA Standards Board

Abstract: An all-new family of software-based intelligent process automation technologies has emerged recently. Because of the newness of this kind of automation capability, there are no common definitions of concepts, capabilities, terms, technology, types, etc. This standard is published for the purpose of promoting clarity and consistency in the use of Software Based Intelligent Process Automation (SBIPA) terminology. The definitions represent the consensus of a diverse panel of industry participants.

Keywords: AI, artificial intelligence, autonomic, business process management, cognitive computing, data fabric, data seeding, digital labor, digital workforce, intelligent process automation, machine learning, narrow AI, process choreography, process orchestration, robotic desktop automation, robotic process automation, RPA

The Institute of Electrical and Electronics Engineers, Inc.
3 Park Avenue, New York, NY 10016-5997, USA

PDF: ISBN 978-1-5044-4354-8 STD22795
Print: ISBN 978-1-5044-4355-5 STDPD22795

Important Notices and Disclaimers Concerning IEEE Standards Documents

IEEE documents are made available for use subject to important notices and legal disclaimers. These notices and disclaimers, or a reference to this page, appear in all standards and may be found under the heading "Important Notices and Disclaimers Concerning IEEE Standards Documents." They can also be obtained on request from IEEE or viewed at http://standards.ieee.org/IPR/disclaimers.html.

Notice and Disclaimer of Liability Concerning the Use of IEEE Standards Documents

IEEE Standards documents (standards, recommended practices, and guides), both full-use and trial-use, are developed within IEEE Societies and the Standards Coordinating Committees of the IEEE Standards Association ("IEEE-SA") Standards Board. IEEE ("the Institute") develops its standards through a consensus development process, approved by the American National Standards Institute ("ANSI"), which brings together volunteers representing varied viewpoints and interests to achieve the final product. IEEE Standards are documents developed through scientific, academic, and industry-based technical working groups. Volunteers in IEEE working groups are not necessarily members of the Institute and participate without compensation from IEEE. While IEEE administers the process and establishes rules to promote fairness in the consensus development process, IEEE does not independently evaluate, test, or verify the accuracy of any of the information or the soundness of any judgments contained in its standards.

IEEE Standards do not guarantee or ensure safety, security, health, or environmental protection, or ensure against interference with or from other devices or networks. Implementers and users of IEEE Standards documents are responsible for determining and complying with all appropriate safety, security, environmental, health, and interference protection practices and all applicable laws and regulations.

IEEE does not warrant or represent the accuracy or content of the material contained in its standards, and expressly disclaims all warranties (express, implied and statutory) not included in this or any other document relating to the standard, including, but not limited to, the warranties of: merchantability; fitness for a particular purpose; non-infringement; and quality, accuracy, effectiveness, currency, or completeness of material. In addition, IEEE disclaims any and all conditions relating to: results; and workmanlike effort. IEEE standards documents are supplied "AS IS" and "WITH ALL FAULTS."

Use of an IEEE standard is wholly voluntary. The existence of an IEEE standard does not imply that there are no other ways to produce, test, measure, purchase, market, or provide other goods and services related to the scope of the IEEE standard. Furthermore, the viewpoint expressed at the time a standard is approved and issued is subject to change brought about through developments in the state of the art and comments received from users of the standard.

In publishing and making its standards available, IEEE is not suggesting or rendering professional or other services for, or on behalf of, any person or entity nor is IEEE undertaking to perform any duty owed by any other person or entity to another. Any person utilizing any IEEE Standards document, should rely upon his or her own independent judgment in the exercise of reasonable care in any given circumstances or, as appropriate, seek the advice of a competent professional in determining the appropriateness of a given IEEE standard.

IN NO EVENT SHALL IEEE BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO: PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE PUBLICATION, USE OF, OR RELIANCE UPON ANY STANDARD, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE AND REGARDLESS OF WHETHER SUCH DAMAGE WAS FORESEEABLE.

Translations

The IEEE consensus development process involves the review of documents in English only. In the event that an IEEE standard is translated, only the English version published by IEEE should be considered the approved IEEE standard.

Official statements

A statement, written or oral, that is not processed in accordance with the IEEE-SA Standards Board Operations Manual shall not be considered or inferred to be the official position of IEEE or any of its committees and shall not be considered to be, or be relied upon as, a formal position of IEEE. At lectures, symposia, seminars, or educational courses, an individual presenting information on IEEE standards shall make it clear that his or her views should be considered the personal views of that individual rather than the formal position of IEEE.

Comments on standards

Comments for revision of IEEE Standards documents are welcome from any interested party, regardless of membership affiliation with IEEE. However, IEEE does not provide consulting information or advice pertaining to IEEE Standards documents. Suggestions for changes in documents should be in the form of a proposed change of text, together with appropriate supporting comments. Since IEEE standards represent a consensus of concerned interests, it is important that any responses to comments and questions also receive the concurrence of a balance of interests. For this reason, IEEE and the members of its societies and Standards Coordinating Committees are not able to provide an instant response to comments or questions except in those cases where the matter has previously been addressed. For the same reason, IEEE does not respond to interpretation requests. Any person who would like to participate in revisions to an IEEE standard is welcome to join the relevant IEEE working group.

Comments on standards should be submitted to the following address:

Secretary, IEEE-SA Standards Board
445 Hoes Lane
Piscataway, NJ 08854 USA

Laws and regulations

Users of IEEE Standards documents should consult all applicable laws and regulations. Compliance with the provisions of any IEEE Standards document does not imply compliance to any applicable regulatory requirements. Implementers of the standard are responsible for observing or referring to the applicable regulatory requirements. IEEE does not, by the publication of its standards, intend to urge action that is not in compliance with applicable laws, and these documents may not be construed as doing so.

Copyrights

IEEE draft and approved standards are copyrighted by IEEE under US and international copyright laws. They are made available by IEEE and are adopted for a wide variety of both public and private uses. These include both use, by reference, in laws and regulations, and use in private self-regulation, standardization, and the promotion of engineering practices and methods. By making these documents available for use and adoption by public authorities and private users, IEEE does not waive any rights in copyright to the documents.

Photocopies

Subject to payment of the appropriate fee, IEEE will grant users a limited, non-exclusive license to photocopy portions of any individual standard for company or organizational internal use or individual, non-commercial use only. To arrange for payment of licensing fees, please contact Copyright Clearance Center, Customer Service, 222 Rosewood Drive, Danvers, MA 01923 USA; +1 978 750 8400. Permission to photocopy portions of any individual standard for educational classroom use can also be obtained through the Copyright Clearance Center.

Updating of IEEE Standards documents

Users of IEEE Standards documents should be aware that these documents may be superseded at any time by the issuance of new editions or may be amended from time to time through the issuance of amendments, corrigenda, or errata. An official IEEE document at any point in time consists of the current edition of the document together with any amendments, corrigenda, or errata then in effect.

Every IEEE standard is subjected to review at least every 10 years. When a document is more than 10 years old and has not undergone a revision process, it is reasonable to conclude that its contents, although still of some value, do not wholly reflect the present state of the art. Users are cautioned to check to determine that they have the latest edition of any IEEE standard.

In order to determine whether a given document is the current edition and whether it has been amended through the issuance of amendments, corrigenda, or errata, visit the IEEE Xplore at http://ieeexplore.ieee.org/ or contact IEEE at the address listed previously. For more information about the IEEE-SA or IEEE's standards development process, visit the IEEE-SA Website at http://standards.ieee.org.

Errata

Errata, if any, for all IEEE standards can be accessed on the IEEE-SA Website at the following URL: http://standards.ieee.org/findstds/errata/index.html. Users are encouraged to check this URL for errata periodically.

Patents

Attention is called to the possibility that implementation of this standard may require use of subject matter covered by patent rights. By publication of this standard, no position is taken by the IEEE with respect to the existence or validity of any patent rights in connection therewith. If a patent holder or patent applicant has filed a statement of assurance via an Accepted Letter of Assurance, then the statement is listed on the IEEE-SA Website at http://standards.ieee.org/about/sasb/patcom/patents.html. Letters of Assurance may indicate whether the Submitter is willing or unwilling to grant licenses under patent rights without compensation or under reasonable rates, with reasonable terms and conditions that are demonstrably free of any unfair discrimination to applicants desiring to obtain such licenses.

Essential Patent Claims may exist for which a Letter of Assurance has not been received. The IEEE is not responsible for identifying Essential Patent Claims for which a license may be required, for conducting inquiries into the legal validity or scope of Patents Claims, or determining whether any licensing terms or conditions provided in connection with submission of a Letter of Assurance, if any, or in any licensing agreements are reasonable or non-discriminatory. Users of this standard are expressly advised that determination of the validity of any patent rights, and the risk of infringement of such rights, is entirely their own responsibility. Further information may be obtained from the IEEE Standards Association.

Participants

At the time this IEEE guide was completed, the Intelligent Process Automation Working Group had the following membership:

Lee Coulter, *Chair*
John Hindle, *Vice Chair*
James Manos, *Secretary*

Ian Barkin
Frank Casale
Cliff Justice
Abhijit Kakhandiki

The following members of the entity balloting committee voted on this guide. Balloters may have voted for approval, disapproval, or abstention.

Ascension Ministry Service Center, LLC
Automation Anywhere Inc.
Blue Prism
Institute for Robotic Process Automation & Artificial Intelligence (IRPA AI)
ISG
KPMG International
Schneider Electric
Symphony Ventures, Inc.

When the IEEE-SA Standards Board approved this guide on 14 June 2017, it had the following membership:

Jean-Philippe Faure, *Chair*
Gary Hoffman, *Vice Chair*
John D. Kulick, *Past Chair*
Konstantinos Karachalios, *Secretary*

Chuck Adams
Masayuki Ariyoshi
Ted Burse
Stephen Dukes
Doug Edwards
J. Travis Griffith
Michael Janezic
Thomas Koshy
Joseph L. Koepfinger*
Kevin Lu
Daleep Mohla
Damir Novosel
Ronald C. Petersen
Annette D. Reilly
Robby Robson
Dorothy Stanley
Adrian Stephens
Mehmet Ulema
Phil Wennblom
Howard Wolfman
Yu Yuan

*Member Emeritus

Introduction

This introduction is not part of IEEE Std 2755-2017, IEEE Guide for Terms and Concepts in Intelligent Process Automation.

Since approximately 2010, a new type of technology has emerged that is neither an operating system nor an application, but is a platform built to provide digital process automation that mimics human operations in a digital environment. This new technology can use single or multiple applications or systems through the standard human interface layer (HIL) in the same way a human operator would.

Early uses of this new technology have been to replace rote or strictly transactional processing previously performed by humans. With the addition of increasingly sophisticated rules engines, analytics, machine learning, and cognitive computing; these technologies are now capable of performing human tasks, including assessment, reasoning, decision making, and probabilistic and/or deterministic process fulfillment. Collectively, this capability, when deployed in the modern enterprise, is “intelligent process automation.”

This guide is intended to establish basic terms, concepts, and nomenclature that promote clarity and understanding among industry participants in this emerging space. This guide is neither comprehensive nor exhaustive and is intended to be a living document periodically refreshed to maintain its accuracy, currency, and usefulness to practitioners.

It will also serve as a basis for future standards that establish technology taxonomy, functional capabilities, and descriptions.

Throughout this guide, some terms are defined using terms that are defined elsewhere within the guide. These terms will be annotated and linked within this guide. This guide is organized in three subclauses intended to first define foundational terms and then logically sequence the reader to more complex concepts and terms in a way that is self-referential and circularly consistent with the use of terms defined elsewhere in the guide.

Contents