Getting Ready for Discovery Day

Key metrics and considerations for automating with Software Robots

This document is designed for users, process experts and business analysts to act as a guide to the key metrics and considerations once a process has been selected for software robot automation.

Overview

1. Basic description and purpose of process
2. How long does the process take on average?
3. How many times a day do you have to execute the process on average?
4. How many users are routinely involved in daily processing (e.g. three users do it for two hours each every day)

Trigger

5. What is the trigger for the process?
6. How does a user know about the trigger (are they notified or do they need to check manually)?
7. How frequent is the trigger (e.g. 10am everyday or constantly throughout the day)?

Processing Window

8. What is the processing window (e.g. from 10am - 2pm)?
9. Are there any cut offs or deadlines (e.g. orders received by 2pm are processed by 6pm)
10. Can the process be done by the robot out of hours or overnight?

Applications

11. List of applications used in the process / purpose / login required?

12. List of data sources used in the process (e.g. looking up an exchange rate in an excel file)
13. How each application is accessed (e.g. desktop application, via browser, via terminal, via Citrix)?

Errors / Exceptions

14. List of known error messages experienced whilst processing (e.g. customer is over credit limit or item is not on customer buying list)
15. List how a user would deal with the errors (e.g. correct / ignore / flag for later etc)
16. List of exceptions that would definitely need user intervention

Output

17. Describe the current output of the process
18. How would you like the robot to report on it's activities (e.g. only report exceptions or report all transactions and results etc)

User Experience

19. Is there any particular bug bare with the process for the users that would represent a win if the robot can take care of it?
20. Is the process prone to errors (such as typos with manual input of data)?
21. What impact do errors have in terms of corrections for the users or downstream processes?
22. Is there any physical element such as passing a print out to a colleague (that the robot would need to cater for digitally)?

Other Activities

23. Consider what other activities a user could be doing instead of this process

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