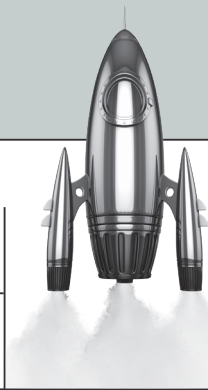

QUICK GUIDE

SANDBOX INTRODUCTION

^{RPA}
SUPERVISOR



	OPTIMIZE YOUR DIGITAL WORKFORCE		
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INTRODUCTION

The purpose of the sandbox is to give customers hands-on experience with the RPA Supervisor. Experiencing firsthand what the optimization of the digital workforce looks like.

In addition, it will of course allow you to

- Create and manage **Workflows** and **Tasks**
- See how the optimization and prioritization behaves with alternative SLA's and workloads
- To use configuration options and generally getting a good understanding of the functionality

Our goal with the sandbox is to show you and your team how your organization will benefit from implementing the RPA Supervisor. More importantly, we aim to provide you with the experience and understanding to support your efficient implementation of the RPA Supervisor in your organization.

In the interest of ensuring an efficient "sandbox period", only the core functionality of the RPA Supervisor is available. Therefore, functionality like; Role and authorization; Notification center; Restarting of resource PC's and Reporting configurations has been omitted.

GETTING STARTED

The RPA Supervisor sandbox provides you with a complete RPA Supervisor and Blue Prism environment. It contains a set of processes automated with Blue Prism.

The processes represent typical business processes and have already been onboarded into the RPA Supervisor. Workflows and Tasks have been created and the RPA Supervisor is already optimizing the simulated production environment. The Workflows and Tasks are created based on the included business requirement descriptions for each process.

Your RPA Supervisor contact person will supply you with **login description** and **credentials** to your sandbox. The RPA Supervisor interface will be available via a URL directly from your computer. For the assigned "super users", which will also have access to Blue Prism Control room on a remote computer, login is provided via **Remote Desktop Connection** (limited to one concurrent connection).

The next step is to login and verify that you have access and that the environment is up and running. Before you start to play around with SLA's and configurations, we recommend that you read this document and the Quick Guide "**Introduction to Workflows and Tasks**".

We strongly recommend that you start off trying to understand the Workflows and Tasks that are already set up for you in the sandbox. Try to understand why they are set up the way they are based on the business and operational context which is provided for each of the automated business processes. Once you understand the Workflows and Tasks and how RPA Supervisor prioritizes the digital workforce based on those you can start experimenting more.

BUSINESS PROCESS CONTEXT

By understanding the translation of business goals and requirement into Workflows and Tasks you can start the process of collecting data about your own automated processes. This, together with your automation design, is the most important factor for creating an SLA strategy best suited for your organization.

In order to create an SLA strategy to match your organizations it is important to collect information about the context of your automated processes. This context is often grouped by the following main categories:

- Process purpose and goals
- When and where does the work arise?
- What are the response-time goals and limits?
- When can work be performed?
- Who is the recipient of the process outcome?

For this sandbox we have provided a one-page example form for the “loan” process and a summarized version for all processes in the sandbox in excel.

Business process (Workflow name)	Business process (Workflow description)	How often work is generated? (continuous flow, batch, file, etc.)	Business process (Workflow description)	Business process (Workflow description)	Business process (Workflow description)	Business process (Workflow description)	Business process (Workflow description)	Business process (Workflow description)	Business process (Workflow description)	Business process (Workflow description)
EMI Payments	Repayments requests are generated by customers on a continuous basis. Requests are picked up from the Core system and then processed. Customers expect transactions to be completed within 15 minutes. Workload varies widely. Highest recorded workload is 100 requests per day.	Continuously	15 minutes	300	24/7	Customer	Trigger: Request time Response time: 15 minutes Working hours: 24/7 Maximum and visible workloads: 100 requests Time with time average: 15 minutes	Time Interval: Every 15 minutes Picking items in batch: 100 requests Picking items in batch: 100 requests Picking items in batch: 100 requests		
Print label - Request	Approved credit card applications are collected from the credit card approval system and registered in the Credit Card System which sends labels to cardholders. The order placed on the 24th of the product not day. Current delivery time is within 24 hours, the business goals to deliver it the same day or to be approved. Highest recorded workload is 500 requests per day.	Continuously	Before 08:00 every day	500	08:00 - 18:00	Internal Customer	Trigger: Request time Response time: 30 minutes Working hours: 08:00 - 17:00 Maximum and visible workloads: 500 requests Time with time average: 30 minutes	Time Interval: Every 30 minutes Picking items in batch: 500 requests Picking items in batch: 500 requests Picking items in batch: 500 requests		
Credit Card - Application	Credit card orders are received 24/7 from external partner via API to the Credit Card System. Applications must be processed within 60 minutes (peak requirement), but API for response has 1hr. Workload varies. Highest recorded workload is 800 requests per hour.	Continuously	24 hours	800	24/7	Customer	Trigger: Request time Response time: 1 minute Working hours: 24/7 Maximum and visible workloads: 800 requests Time with time average: 1 minute	Time Interval: Every 1 minute Picking items in batch: 800 requests Picking items in batch: 800 requests Picking items in batch: 800 requests		
Loan Approval	Processing incoming requests (customer data, prices and requests) before they are entered into SAP for approval of authorized personnel. The work is not time critical but it is important to handle any discrepancy with suppliers. Processors should be pro.	Continuously	8 hours	100	24/7	Customer	Trigger: Request time Response time: 15 minutes Working hours: 08:00 - 17:00 Maximum and visible workloads: 100 requests Time with time average: 15 minutes	Time Interval: Every 15 minutes Picking items in batch: 100 requests Picking items in batch: 100 requests Picking items in batch: 100 requests		
Customer Onboarding	Customers register via online website and is processed as individual request. Request is validated and customer request contact person, customer support and verification sent to customer.	Continuously	1 hour	300	24/7	Customer	Trigger: Request time Response time: 1 minute Working hours: 24/7 Maximum and visible workloads: 300 requests Time with time average: 1 minute	Time Interval: Every 1 minute Picking items in batch: 300 requests Picking items in batch: 300 requests Picking items in batch: 300 requests		
Customer Inquiries	Adding customer data in multiple system from central CRM system. Most of the customers are updated between 09:00 and 18:00. The work is not time critical but it is important to handle any discrepancy with suppliers. Processors should be pro.	Daily batch	24 hours	2000	24/7	System	Trigger: Request time Response time: 1 hour Working hours: 08:00 - 17:00 Maximum and visible workloads: 2000 requests Time with time average: 1 hour	Time Interval: Daily at 08:00 Picking items in batch: 2000 requests Picking items in batch: 2000 requests Picking items in batch: 2000 requests		
Invoice Approval - Credit	Customers requests savings accounts online 24/7. The requests are sent via email to customer for being quickly processed. The request are validated and approval for demand and then sent to the customer to be approved. Request is not time critical but it is important to handle any discrepancy with suppliers. Processors should be pro.	Continuously	1 hour	100	24/7	Customer	Trigger: Request time Response time: 15 minutes Working hours: 24/7 Maximum and visible workloads: 100 requests Time with time average: 15 minutes	Time Interval: Every 15 minutes Picking items in batch: 100 requests Picking items in batch: 100 requests Picking items in batch: 100 requests		
Invoice Processing	Processing incoming requests (customer data, prices and requests) before they are entered into SAP for approval of authorized personnel. The work is not time critical but it is important to handle any discrepancy with suppliers. Processors should be pro.	Continuously	24 hours	5000	24/7	Customer	Trigger: Request time Response time: 1 hour Working hours: 24/7 Maximum and visible workloads: 5000 requests Time with time average: 1 hour	Time Interval: Every 1 hour Picking items in batch: 5000 requests Picking items in batch: 5000 requests Picking items in batch: 5000 requests		

File: "Business requirement overview.xlsx"

RPA SUPERVISOR FUNCTIONALITY

Once you have understood the automated processes and their corresponding Workflows and Tasks you are ready to really get familiar with the RPA Supervisor. Below you will find our recommendations for actions and features for you to try out in prioritized order. For more detailed description of how to use the functionality of the RPA Supervisor please see the appropriate user guide.

NOTE:

The steps below assume that you have navigated to the **Tasks** page in the RPA Supervisor application.

1. Adding Extra Work

By running the processes loading queues you can create more work for the digital workforce. This allows you to see how this affects the prioritization.

- On the **Task** you wish to trigger, click on the button **Actions** and choose **Start Manually**
- Add as much work as you like by clicking **Place Manual Start Order** multiple times

2. Changing Response Times

Another way of affecting the prioritization is to change the response time parameter of the individual Tasks. This might not cause the same immediate effect on the prioritization as adding a lot of work items, but will function as a useful exercise in order to get a good understanding for how the RPA Supervisor prioritizes.

- On the **Task** you wish to change, click on the button **Config**
- Change the value of **Response time** and click **Save and Close**

3. Activating and Deactivating

Both Workflows and Tasks can be Activated and Deactivated in the RPA Supervisor. This is the same as pausing and starting the affected Tasks. As this affects the work available to be handled by the digital workforce, this will also affect the prioritization.

- On the **Workflow** you wish to change, click on **Activate / Deactivate**
- On the **Task** you wish to change, click on **Actions** and select **Activate / Deactivate**

4. Changing Resource Groups

Resource groups can be set up with a varying number of resources. Without a plan for how to use your resources, the prioritization results of changing this is not always as easy to understand as adding work and changing response times. However, in a production environment these restrictions will be known and planning with them is a lot easier.

- On the **Task** you wish to change, click on the button **Config**
- Change the value of **Resource Group** and click **Save and Close**

5. Creating new Workflows and Tasks

Deactivating or deleting Workflows and Tasks allows you to create completely new ones. We recommend setting up Process descriptions based on processes in your own organization and create Workflows and Tasks to support the described business goals and requirements. The processes in the sandbox might not mimic their behavior exactly, it should be possible to create relatively similar situations as your processes have in your own production environment.