

Walkthrough: Evaluate viability of a candidate RPA process

In this walkthrough, you create a new candidate RPA process in MuleSoft RPA Manager. You then use the evaluation tools in MuleSoft RPA Manager to help qualify and prioritize the RPA process for development. You will:

- Create a candidate RPA process in MuleSoft RPA Manager.
- Evaluate a candidate RPA process request by using the Process Evaluation module on the MuleSoft RPA Manager.

Navigate to the Process Evaluation view and

1. Log in to MuleSoft RPA Manager as a user with privileges to create and evaluate business processes for automation using MuleSoft RPA.

Note: In the video, the user is Bonita, who is a business user.

2. Expand the Process Evaluation module in the left-side menu.
3. Select the Process Evaluation view.

Create a New Candidate RPA Process

4. Click Create.
5. Enter “RSVP to MuleSoft Virtual Meetups” in the name field.
6. Click Create.

This opens up an autogenerated process evaluation page for this new process. As discussed previously, this page has a series of qualifying and benefits questions that will move the point in the Process Matrix around. The x- and y-values for the point dynamically adjust depending on the specified benefit and qualifier values, respectively. Benefits to automation can include criteria such as a need for a high output quality, and qualifiers generally are based on an analysis of the business process itself, such as whether or not the data is structured and/or the workflow is stable. Generally, the closer your point is to the top right corner, the better candidate the process is for automation.

Set the Costs for a Candidate RPA Process

7. Set the Manual process execution time to 10 minutes.

Note: This value is a rough estimate based on the time it takes to manually navigate through the various web pages, look for a virtual meetup, and RSVP to it.

8. Enter 20 for the Cost per process run.

Note: This value is an estimate of the value of the productive time spent by the employee completing the task. If the task required any additional costs, they would be factored into this value as well.

9. Set the Frequency per month to 4.

Note: This is assuming that the task is performed roughly once per week.

Set the Qualifiers for a Candidate RPA Process

10. Adjust the slider for the Nature of Work slide bar.

Note: The point moves up and down as you adjust the value.

11. Set the Nature of Work slide bar all the way to the right.

Note: For the use case, the process follows a very specific set of steps and is therefore highly rule-based.

12. Adjust the Input/Output slide bar all the way to the right.

Note: Again, for the use case, the data should be highly structured. The intent is that the user specifies what type of event they are interested in by providing a string of text.

13. Adjust the Stability slide bar so that it is one tick from the right.

Note: Because most websites are intended for users to be able to quickly navigate to locate the desired information, the process should be fairly stable. That said, if the website interface does update, the RPA process will likely need to be updated.

14. Adjust the Data types slide bar so that it is one tick from the right.

Note: The business process will use text on the MuleSoft website to navigate. However, at various points, the MuleSoft RPA Bot must interact with other web page elements, including elements such as a drop-down menu.

Set the Benefits for a Candidate RPA Process

15. Adjust the Output quality slide bar to observe the horizontal motion of the point.

16. Select the Exclude box to the right of the Output quality slide bar to exclude this value when performing the analysis.

Note: This is done for demonstration purposes. However, in practice you may have RPA processes that some criteria are not applicable for, and so should be excluded from the analysis.

17. Adjust the Complexity slide bar to one tick from the right.

Note: The process is fairly simple. It involves a single application and does not have many decisions to be made, though there are a few, such as selecting what event to attend.

18. Leave the Risk slide bar at its default position.

Note: No critical business operations depend on the completion of the business process. The primary benefit of automating the process would be to free up employee time.

19. Observe that the point is fairly close to the top right corner and is thus a viable candidate for automation.

20. Click Save.

21. Locate the process in the Process Evaluation list to ensure that it is saved properly.

Congratulations! You have now successfully completed your first walkthrough working with MuleSoft RPA.