AutoiQ resource requirements

Introduction

The purpose of this document is to provide a reasonable estimation of resources required for a new deployment of OpenConnect's AutoiQ solution. Implementation resources may vary based on the preferences of the customer and preferred capture environments. As such, the requirements outlined in this document should not be considered complete until accompanied by a requirements review and Statement of Work (SoW).

When a customer purchases AutoiQ, there are two phases to putting it to work for the customer. They occur in this order:

- Deployment — This is the actual implementation of the AutoiQ software, including installing the robots, identifying processes, and creating process frameworks. This takes approximately six weeks.

- Production — After the initial deployment is complete, there is the ongoing development of tasks — discrete work items for the robots — that reflect the discovered processes.

Roles used in this document

Customer roles		OpenConnect roles	
Business Owner	Businessperson responsible for AutoiQ	**Sales Executive**	OpenConnect person responsible for the account
Business Project Manager	Person responsible for delivering the project	**Project Manager**	Person responsible for delivering the project for the business
IT Project Manager	Person responsible for delivering the project for IT		
IT Server Support	Person responsible for supporting the server that will host AutoiQ	**Solution Architect**	Person responsible for designing the solution and working with customer IT to deploy AutoiQ
Business Analyst(s)	Person(s) responsible for identifying automation scenarios and documenting requirements	**AutoiQ Specialist**	Person responsible for developing process workflows and tasks
Application SME	Person responsible for confirming steps to follow to navigation applications		
Developer(s)*	Person(s) responsible for developing process workflows	**Trainer**	Person responsible for training the customer to support and use AutoiQ
Task Developer(s)*	Person(s) responsible for developing robot tasks		

* Not required if managed services are purchased from OpenConnect.

Stage 1: Planning

Overview

The planning stage is used to create a deployment plan. The OpenConnect Services Team will work directly with the customer's IT team to create a plan that conforms to the customer processes and procedures. Companies have different processes and standards (including how access is granted to specific hardware and software), so it's important to work together to make sure the OpenConnect software deployment can be accomplished within the customer processes.

Time required: One to two hours

The planning stage is usually accomplished with one or two one-hour meetings. All meetings can be accomplished remotely. Some customers prefer to have two separate meetings, one for desktop planning and one for server installation planning.

Customer resources required

- Project Manager(s)

Stage 2: Product installation

Overview

The product installation consists of the following tasks:

- Product installation
- IT training

Task: Product installation

The server software will be installed by the IT Server Support personnel with OpenConnect guidance.

IT training will also be provided during the software installation. The training includes:

- Installation instructions and best practices for installing and upgrading the server software
- Server software configuration and best practices

Time required: One day

Actual installation of the software usually takes only a few hours, but an entire day should be planned so that time is available to handle potential issues and training/mentoring can be included. This task includes installation and configuration of the server software.

Customer resources required

- IT Server Support
- Any IT resources that need to be familiar with the product

Stage 3: Process discovery and development

Overview

The requirements of the process(es) to be automated will be documented, then handed to a developer to build. A process module is customized to the specifics of each customer's environment and mimics the workflow. Some of the characteristics of a process include:

- How to access and navigate the core applications
- The data that is passed into and out of the process
- The data contained in the reports

Task: Process requirements discovery

An OpenConnect AutoiQ specialist will work with the Business Analysts and SMEs to fully understand the process workflow. SMEs will provide demonstrations of accessing and navigating applications. Decisions will be made concerning metrics for AutoiQ reports. Each process will be fully documented.

Time required: One day

One full day should be set aside to fully understand and document the process workflow. If needed, this task can be spread over several days.

Customer resources required

- Product Manager(s)
- Business Analyst(s)
- Application SMEs

Task: Process Module development

The Process requirements document will be used by a developer to build the process module, including task development for basic application navigation (login, logoff, *etc*.). This development is done by either the customer or OpenConnect's AutoiQ specialist.

Time required: One week

Depending on the skill set of the customer's developers, this task may take longer.

Customer resources required

- Developer*
- Task Developer*

* Not required if managed services are purchased from OpenConnect.

Stage 4: Task development (ongoing)

Overview

The intelligence of the robots is contained in tasks. Each new task adds more intelligence to the robots. Tasks are developed to automate a single item, such as the resolution of an error on a pended health claim. Tasks are developed using the tool native to the application environment. Task development includes the following:

- Business requirement documentation
- Task development
- Unit testing
- User acceptance testing
- Production deployment

Time required: Varies by task complexity

- Low-complexity task: One week
- Medium-complexity task: Two to four weeks
- High-complexity task: Five to eight weeks

Customer resources required

- Business Analyst
- Application SME
- Task Developer*

* Not required if managed services are purchased from OpenConnect.

Summary of time requirements

Role	Tasks	Time required
Project Manager		
IT Server Support	• Planning • Product installation • IT training	10–12 hours (Does not include hardware setup)
Business Analyst	• Process requirements discovery • Task development	Two weeks
Application SME	• Process requirements discovery • Task development	Two weeks
Developer*	• Process module development	Two to four weeks
Task Developer*	• Process module development • Task development	[Varies according to number and complexity of tasks]

* Not required if managed services are purchased from OpenConnect.

Hardware and software requirements

Server environment

- Automation server environment
  - — OS: 64-bit Linux or Windows
  - — RAM: 32 GB
  - — Available disk space: 100 GB
- Network access to mainframe's TN3270 server (required only if mainframe applications are part of the automated process)

Development environment

- Automation development environment
  - — OS for developing robot logic: Windows (XP or later)
  - — Access to all client applications required to automate processes
- Network access to mainframe's TN3270 server (required only if mainframe applications are part of the automated process)

Process environment

- [Required only if desktop or Web-based applications are part of the automated process]
- Automation client environment (one environment for each desktop robot license)
  - — OS for "normal" client applications required to automate processes: Windows (XP or later)

Post-production training and mentoring

OpenConnect offers follow-on services that can be tailored for each customer — such as training and mentoring, data analysis, and health checks. For more details regarding these additional services, please contact your OpenConnect Account Team.

About OpenConnect

OpenConnect is the leader in process intelligence and desktop analytics solutions that objectively identify and illuminate workforce activity, resulting in associated productivity gains. With OpenConnect's software robotic process automation, the costliest processes performed by a workforce can be automated. Combining unparalleled experience and solution capabilities, OpenConnect enables its clients to more quickly address and adapt to today's operational and competitive challenges, often summarized as accomplishing more with fewer resources.

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