<Company> System, Inc.

Intelligent Automation

Bot Nomenclature Guidelines

Confidential

Versioning

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# Introduction

To ensure uniformity in naming of Bots and automated processes deployed using Intelligent Automation, it is necessary to have a consistent approach to Bot nomenclature.

This document provides a basic naming convention to ensure consistent and implementable naming rules for Bots. Based on additional inputs the naming convention may be modified from time to time. Care should however be taken to ensure that the nomenclature does not become complex and continues to serve few key purposes.

# Intent based nomenclature

To achieve clarity and business relevance for key intelligent automation facilitators and stakeholders such as Automation Administrators, Support Teams, Business Process Owners, Process SMEs, Developers, etc., it is advisable to follow an intent based approach to naming of Bots.

The key in the intent based approach is to capture the complete business purpose or functional intent when specifying the name of the Bot.

Suppose there is a requirement for a Bot that should perform on-boarding process for new customers. You can of course name it “Onboard” but that is not very obvious. Obvious questions that remain unanswered from a business perspective would be, on boarding for which process, department, etc. A more apt but brief description of the intent would read something like “New Customer On-boarding”.

# Suggested naming convention

A simple naming convention is recommended below:

<Unique Bot ID> <Month & Year of Creation> <Department or Process ID> <Region ID> <Brief Description of Bot>

<Unique Bot ID> 6 digits

A unique Bot ID must be used for each bot. This should be system generated incremented unique ID. Suggest using a 6 digit unique id to provide sufficient flexibility for numbers of bots and other likely parameters that may be encountered in complex enterprise bot deployments. The unique Bot ID can be reset to ‘0’ at the beginning of each year if the month and year are also tracked as part of the nomenclature.

Note: Unique Bot ID should not be confused with internal Access IDs and Passwords used by Bots to comply with Identity and Access Management protocols.

<Month & Year of Creation> MMYY format

Denotes the month and year in which the unique Bot ID was generated.

<Department or Process ID> 4 characters

Department or Process ID indicates the primary department affiliation of the designated Business Process Owner for the Bot. Should be as per <Company>’s internal departmental or process naming guidelines. If separate department codes are required then this should be standardized to a 4-6 character list of codes that map to business processes and departments within <Company>.

<Region ID> 4 character [Optional]

Region ID specifies if the Bot is developed for use within a single geographic or business unit or company-wide usage. Care should be taken to narrow down the scope of the bot sufficiently as this will prevent inadvertent or unauthorized use of Bots beyond the scope for which they were designed.

<Brief Description of Bot> 32 characters

As indicated in the intent based approach to nomenclature, this description should briefly capture the business objective for which the bot is developed. A quick test of the description should be that the L1 support team should be able to understand the Bot’s intent by reading this description.

# Bot naming examples

For example, let us assume we are creating a Bot for an HR department.

Business Process:

HR coordinator collects required statutory and compliance documents from employees who are joining the organization. In the absence of Automation, HR department would manually review each email, download each candidate’s documents and save it to particular folder.

Intelligent Automation should read the email which is sent by new joinees save all documents in particular folder.

Naming the Bot as per the recommended approach would be as follows:

Bot Unique ID: 000305 [Six digit unique bot id generated by system]

Month & Year of Bot ID Creation: 0419 [MMYY format]

Department: HRHQ [Four character dept or business process code]

Region ID: USA1 [Four character region code]

Brief Description of Bot: Receive New Employee Documents

Based on the recommended format the name of the Bot would be:

<Unique Bot ID> <Month & Year of Creation> <Department or Process ID> <Region ID> <Brief Description of Bot>

**000305\_0419\_HRHQ\_USA1\_ Receive New Employee Documents**

Note: Each part in the name is separated by “\_” for clarity

Reference to Support Knowledge Base

Each bot will have multiple other unique attributes such as version number, business process owner, number and names of sub-bots used, application owner details, etc., which are important for management and maintenance of the Bot. It should however be borne in mind that adding too much information to naming of Bots will clutter the Bot name and defeat the purpose of quickly identifying basic information required to initiate a business or technical conversation with regard to a Bot or an automated process.

Additional pertinent and comprehensive details with regard to each Bot should be maintained in the Support Knowledge Base, please refer to Intelligent Automation Support Model and in the COE’s technical design and development library. Bot nomenclature is but a first level reference that points to required information in such other information stores.

Use of multiple bots in a process

In cases where an automated process requires multiple Bots to be deployed or used, the same nomenclature rules should be applied. This will ensure that Bot nomenclature, traceability and purpose remain simple and any ‘sub-bots’ are identified by the team conducting the necessary due diligence on a specific Bot. This approach retains the modularity required to ensure scalability.

Deactivating or Updating Bot names

For substantial changes to Bots it should be discussed whether new Bot names are required. From a traceability perspective, it is recommended that rather than retaining older Bot names, the old Bot IDs and associated name are deactivated or retired and new ones assigned that provides an accurate picture of the current state of an operational bot.

For cases such as changes in Business Process Owners for Bot as well, it would be good practice to create new Bot names from scratch and retire the previous ones.

For minor enhancements not affecting any functionality, existing Bot name can be retained unless there is comprehensive work being done to fix errors, performance or design issues.

# Bot nomenclature using the Intelligent Automation Platform

It is desirable that the rules for Bot nomenclature be implemented as part of or integrated into the Intelligent Automation Platform so that human errors in creation of Bot names can be eliminated. This will also enable ongoing reporting and management of complete bot inventory in a single integrated location.