# Automation Anywhere - Proof of Concept (POC)

This document serves as a guide for organizations preparing to conduct an Automation Anywhere POC. Included in this guide is a list of Frequently Asked Questions (FAQs) as well as a POC checklist to complete in advance of the POC start date.

**Automation Anywhere – POC FAQs**

## Q. What is a Robotic Process Automation (RPA) POC?

**A**. POC stands for Proof of Concept, in which either an Automation Anywhere developer or a Certified Automation Anywhere Partner Developer will automate a process to showcase Automation Anywhere RPA capabilities.

## Note: A POC is not a commitment or agreement to automate a process for deployment in Pilot/Production.

**Q. Why is a POC done?**

**A**. A POC is done to showcase the Automation Anywhere platform’s capability to automate a process in the customer’s environment. In addition, the POC will demonstrate the RPA development process with Automation Anywhere for pre-identified business use cases that include:

* Integration with underlying sub-systems
* Coverage over key technology and operations
* Integration with existing security architecture

## Q. What is not a POC?

**A**. A POC is NOT an engagement entailing:

|  |  |
| --- | --- |
| * An IT architecture review | * Process re-engineering assessment |
| * Client enterprise modeling | * A replacement for a production pilot |
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**Q.** **What is POC Approach?**

The decision was taken to use a pragmatic approach and capture all screens from the target system and enter the data which was provided to the team in the form of the screen shots at the beginning of the process

## Q. How long does a POC last?

**A**. As a guideline, Automation Anywhere are performed over 5-6 days. Through joint discussions, the client lead and pre-sales consultant along with the customer will determine the scope of the processes to be automated. Once this is determined, the RPA developer responsible for delivering the automations will sign-off on the final POC scope and deliverables.

## Q. What kind of processes are strong candidates for a POC?

**A**. Any manual, higher volume, repetitive, rules-based processes that require a human to interact with multiple systems while processing a transaction is ideal.

Note: Even if an entire critical process may not be able to be fully automated in 5-6 days, it should still be considered knowing key success criteria for the POC is experiencing the power and ease of use of Automation Anywhere automation capabilities interacting with multiple customer systems in context to a high-value business process.

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## Q. How can a POC be delivered?

**A**. Remotely **–** Via secure access to the prospective customer’s system

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## Q. What needs to be completed prior to the POC?

**A**. A POC Checklist on the next page details the steps needed to be completed prior to the POC. These items will be discussed on a pre-POC call that is conducted **at least 5 days before** the POC start date. The pre-POC call will enable all customer and Automation Anywhere participants’ sufficient time to complete any prerequisite work prior to the POC commencing.

# Proof of Concept Checklist

You will find some steps below that need to be taken prior to the Pre-POC call. The RPA Developer will check these requirements during the call, and if any are not met, your Proof of Concept may be delayed.

**Process Document** – This is a check that a Process Document detailing the steps of the automation process has been created and sent to the developer PRIOR to the Pre-POC call.

* The Process Document contains detailed steps and screenshots (sensitive data can be masked) that explain to the developer exactly how the process functions correctly.
* The process must be detailed very simply, such that someone looking at the process for the first time could understand the instructions.
* For example: Open Application in Internet Explorer. Click on Username field. Enter Username. Click on Password field. Enter Password. Click on “Login” button. Maximize window.
* The developer will analyze the scope of the given process to be automated and determine if it is feasible to complete within the allotted days of the POC. If it is not feasible to complete automation of the entire process within the allotted days, it is up to you and the developer to agree on a lesser scope.

**Remote Server Connection** -- Via secure access to the prospective customer’s systems.

**Automation Anywhere Installation** – This is a check that Automation Anywhere is installed on the machine to be used, has the correct licenses to run, and can interact with the applications involved in the process to be automated.

* Check that the latest version of Automation Anywhere is installed on the machine.
* (optional) Check that trial licensing has been obtained from the AA Sales Rep or the AA website.
* Launch and click on new project.
* Look for the Action panel on the left side of the screen and search for the Message Box activity. Click and drag that message box activity into the middle of the screen
* Type “Hello” (including the quotation marks) into that message box activity.
* Hit Run
* If a message box containing the text “Hello” appears on the screen, then you are good to go!

**Environment Access Check** – This is a check that the developer has access to the systems and applications involved in the automation process, and that Automation Anywhere has access to the system and application selectors.

* Check that the developer has access to all systems and applications related to the automation process.
* Check that the developer has the necessary credentials to access these systems and applications.
* Check that AA selectors can interact with your systems and applications
* Move your mouse around your application and check that blue boxes appear around the elements of your systems and applications.

**Subject Matter Expert Availability** – This is a check that a Subject Matter Expert will be available to be in the room with the developer for the duration of the POC. This is a legal issue – at no point should the developer be left alone with access to your system.

* A Subject Matter Expert of the process to be automated will be in the room with the developer for the duration of the POC.