



ESAF AutoPilot™

User Provision Guide

Automated Request Management System

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Welcome to ESAF AutoPilot™

Quick Start: If you're new, just run the `autopilot.exe` file and choose Option 1 for initial setup!

ESAF AutoPilot™ is your intelligent assistant for managing access requests automatically. Think of it as your personal robot that handles the boring, repetitive work so you can focus on important tasks.

What This Tool Does For You

- **Automatically downloads** access requests from ESAF system
- **Smartly assigns** requests to your team members
- **Generates beautiful reports** and dashboards
- **Saves hours** of manual work every day

Who Should Use This Tool

- **Access Management Teams** - For daily request processing
- **Team Leads** - For workload distribution and monitoring
- **Managers** - For reporting and analytics

Getting Started - What You Need

Before You Begin

IMPORTANT: Make sure you have these ready before starting:

- **Windows computer** with internet connection
- **Edge Browser** (recommended)
- **ESAF system access** with your login credentials

Download and Installation

1. Download the `autopilot.exe` file from the shared location
2. Create a folder called "ESAF AutoPilot" on your desktop
3. Place the `.exe` file in this folder
4. Double-click to run - that's it! No complex installation needed.

Pro Tip: Create a shortcut on your desktop for easy access!

First-Time Setup - Getting Ready

When you run ESAF AutoPilot for the first time, you'll see a beautiful blue screen with options. **Start with Option 1** to configure everything.

Step-by-Step Configuration

Remember: You only need to do this setup once!

Option 1: Configuration Management

Choose this first to set up everything:

- **0 - Edit ESAF URL:** The website address of your ESAF system
- **1 - Capture Mouse Coordinates: MOST IMPORTANT STEP!**
- **2 - Edit Keywords:** What applications to search for
- **3 - Edit Assignees:** Your team members' names
- **4 - Set Downloads Folder:** Where to save files
- **5 - Edit Queues:** Request queues to process
- **6 - Edit Rules:** Assignment limits and thresholds

Capturing Mouse Coordinates - Detailed Guide

This is the most important step! Follow these instructions carefully:

1. Open ESAF system in your browser
2. **Set browser zoom to 100%** (Very important!)
3. Don't move or resize the browser window during setup
4. In AutoPilot, choose Option 1 → "Capture Mouse Coordinates"
5. Follow the on-screen prompts:
 - Hover over "Requests Assigned to Me" → Press ENTER
 - Hover over "Advanced Filter" button → Press ENTER
 - Continue for all 8 positions as prompted

Common Mistake: If browser zoom is not 100%, the mouse clicks will be in wrong positions!

Running the Automation - Your Daily Workflow

After setup, you're ready to use the main features:

Option 2: Full End-to-End Process (Recommended)

This is your "one-click" solution for daily work:

1. **AutoPilot opens ESAF** in your browser
2. **Automatically clicks** through all filters and downloads
3. **Organizes files** in numbered folders
4. **Merges data** and cleans it up
5. **Assigns requests** to team members
6. **Creates summary reports**
7. **Generates interactive dashboard**

Individual Steps (For Specific Needs)

Sometimes you might want to run only specific parts:

- **Option 3:** Only download from ESAF (Step 1)
- **Option 4:** Only merge downloaded files (Step 2)
- **Option 5:** Only assign to team members (Step 3)
- **Option 6:** Only create summary reports (Step 4)
- **Option 7:** Only generate dashboard (Step 5)

How AutoPilot Assigns Requests - The Smart Logic

Intelligent Distribution: AutoPilot ensures fair workload distribution across your team!

Three Types of Requests

- **HCA India:** Requests going to India team
- **HCA Domestic:** Regular US-based requests
- **Meditech:** Special medical system requests

Smart Assignment Rules

Rule	What It Does
India Overflow	If India requests exceed threshold (default: 70), they go to extra queue
Max Per Person	Each person gets maximum requests (default: 15 domestic, 5 Meditech)
App Diversity	Distributes different applications across team members
Round Robin	Cycles through team members for fair distribution

Troubleshooting - When Things Go Wrong

Don't panic! Most issues have simple solutions.

Common Problems and Solutions

Problem	Solution
Mouse clicks wrong places	Recapture mouse coordinates with browser at 100% zoom
No files downloaded	Check internet connection and ESAF login
"Config not found" error	Run Option 1 first to create configuration
Script stops unexpectedly	Press ESC to stop, check error message
Dashboard doesn't open	Make sure all previous steps completed successfully

Emergency Stop - Safety Features

Safety First: You can stop automation ANYTIME by pressing the ESC key!

AutoPilot has multiple safety features:

- **ESC key** - Immediate stop anywhere
- **Mouse to corner** - Move mouse to top-left to stop
- **Ctrl+C** - Traditional stop method

Advanced Usage - Power User Guide

Customizing for Your Team

You can easily modify settings in Configuration Management:

- **Change team members** - Add/remove assignees
- **Adjust limits** - Change maximum requests per person
- **Add new applications** - Include new keywords to search

- **Modify thresholds** - Change when India requests overflow

Multiple Scenario Examples

Real-World Examples: How different teams use AutoPilot

Scenario 1: Daily Morning Routine

- **Time:** 8:00 AM daily
- **Action:** Run Option 2 (Full Process)
- **Result:** All requests assigned and ready by 8:15 AM

Scenario 2: Mid-Day Check

- **Time:** 1:00 PM
- **Action:** Run Option 3 (ESA Automation only)
- **Result:** New requests downloaded and added to existing assignment

Scenario 3: End of Day Reporting

- **Time:** 4:30 PM
- **Action:** Run Option 7 (Dashboard only)
- **Result:** Updated dashboard for management review

Best Practices - Work Like a Pro

Pro Tips: Follow these for smooth operation!

Before Running Automation

- Close unnecessary browser tabs
- Ensure stable internet connection
- Verify ESAF login works manually
- Check available disk space

During Automation

- Don't use mouse or keyboard during process
- Keep browser window visible and not covered
- Monitor progress in the command window

After Automation

- Review the generated dashboard
- Check assignment sheets for accuracy
- Backup important data files

Frequently Asked Questions

1. **Q: Do I need technical skills to use this?** **A:** No! The tool is designed for everyone. Just follow this guide.
2. **Q: What if I make a mistake in configuration?** **A:** No problem! Use Option 1 → "Reset to Defaults" to start over.
3. **Q: Can multiple people use this simultaneously?** **A:** Yes, but each person should have their own copy and configuration.
4. **Q: What happens if internet disconnects during process?** **A:** The tool will stop safely. Just restart from the beginning.
5. **Q: How do I update to new versions?** **A:** Simply replace the .exe file. Your configuration will be preserved.

Need More Help?

- **Check the on-screen instructions** - They're very helpful!
- **Contact your Developer** for specific workflow questions
- **Refer to this guide** for step-by-step instructions

You're All Set!

With ESAF AutoPilot™, you're now equipped to handle access requests faster, smarter, and more efficiently than ever before.

Happy Automating!