Tool: BluePrism

Understanding Blue Prism for Monitoring

Monitoring Capabilities in Detail

- **Dashboarding:** Customizable dashboards with real-time visualization of resource health, process metrics, and exceptions.
- **Reporting:** Granular reports on bot performance, work queue status, and process execution history.
- **Alerts & Notifications:** Configurable alerts based on thresholds or events (e.g., process failures, resource downtime).
- **Logging:** Comprehensive logging of bot actions and process data for audit trail and historical analysis.
- **Resource Monitoring:** Real-time tracking of bot utilization, work queue status, exceptions, and performance bottlenecks.
- **Process Monitoring:** Monitoring end-to-end processes, identifying deviations from standard operating procedures, and ensuring timely completion.
- **Audit & Logging:** Detailed logging of bot actions, providing a clear audit trail for compliance and troubleshooting.

Licensing

Blue Prism's licensing model is typically resource-based (i.e., per bot). For detailed pricing, contact a Blue Prism sales representative. Factors include:

- **Bot Type:** Runtime bots, design/development bots
- **Deployment Model:** On-premises, cloud, hybrid
- **Volume:** Number of bots required
- **Support & Maintenance:** Desired support levels

Customization

Blue Prism allows for extensive customization:

- **Process Development:** Visual design studio to build automations using drag-and-drop logic.
- **Object Studio:** Creation of custom objects to interact with diverse applications (GUI, APIs, mainframes)
- **Code Stages:** Integration of .NET code for advanced functionality or complex logic

When Blue Prism Might NOT be the Best Fit

- **Highly Unstructured Processes:** Blue Prism thrives on rule-based tasks. Processes with many subjective human decisions may need more advanced AI/ML.
- **Small-Scale Automation:** If only a few, isolated tasks require automation, the ROI may not justify the cost.
- **Rapidly Changing Systems:** If underlying applications undergo frequent major updates, bot maintenance overhead could be high.

Performance Metrics

- **Process throughput:** Tasks completed per hour/day
- **Error rate:** Reduction in process errors
- **Cost savings:** Labor hours saved, operational costs reduced
- **Cycle time:** Time taken for task completion
- **ROI:** Quantified return on investment

KPIs for Tool Usage

- **Bot utilization:** Percentage of bots running vs. idle
- **Queue backlog:** Volume of pending tasks
- **Exception rate:** Frequency of bot errors

Use Cases :

Key industries and common scenarios:

Finance & Accounting

- Invoice processing and reconciliation
- Accounts payable/receivable automation
- Financial reporting and consolidation
- Bank reconciliation
- Regulatory compliance reporting
- Tax preparation and filing

Human Resources

- Employee onboarding and offboarding
- Payroll processing and benefits administration
- Time and attendance tracking
- Training and development tracking
- Recruitment data management

Customer Service

- Customer support ticket resolution

- Call center data consolidation and reporting
- Chatbot integration
- Order processing & tracking
- Customer onboarding processes
- Complaint management

Supply Chain & Logistics

- Inventory management and demand forecasting
- Shipment tracking and order status updates
- Vendor onboarding and compliance
- Purchase order processing
- Bill of lading creation

IT Operations

- Server and network monitoring
- Incident and problem management
- User account provisioning
- Data migration and cleanup
- Helpdesk ticket automation

Cross-Industry Uses

- Report generation and distribution
- Data entry and validation across systems
- Website scraping and data aggregation
- Email and document management
- Legacy system interaction

Customer Success Stories (Refer Official site for more cases)

- **Telefónica O2:** Blue Prism deployment streamlined customer service processes, resulting in significant cost savings and efficiency gains.
- **NHS Blood & Transplant:** Blue Prism facilitated organ donation matching process improvement, saving time and improving patient outcomes.
- **Santander:** Blue Prism in back-office operations led to improved accuracy, compliance adherence, and faster process times.

Additional Benefits

- **Scalability:** Quickly handles fluctuating volumes
- **Compliance:** Enforces rules, reduces risks
- **Employee Satisfaction:** Frees staff from mundane task

Finance & Accounting

- **Invoice Processing**
  - Extracting invoice data from various formats (PDF, email, scans)
  - Validating invoice data against purchase orders and contracts
  - Three-way matching (invoice, PO, receipt)
  - Handling exceptions and approvals
  - Posting invoices into accounting systems (SAP, Oracle, etc.)
- **Accounts Payable/Receivable**
  - Automating payment generation and disbursement
  - Sending customer statements and payment reminders
  - Processing credit card and ACH transactions
  - Generating aging reports for accounts receivable
  - Tracking and resolving payment discrepancies and disputes
- **Financial Reporting**
  - Consolidating data from multiple sources (Excel, general ledgers)
  - Generating standard financial statements (P&L, Balance Sheet, Cash Flow)
  - Creating custom reports for specific analysis
  - Automating report distribution to stakeholders
- **Bank Reconciliation**
  - Matching bank statements with internal accounting records
  - Investigating and resolving discrepancies
  - Creating reconciliation reports
- **Regulatory Compliance**
  - Automating data collection for regulatory filings (SOX, 10-K/10-Q)
  - Generating audit-ready reports
  - Monitoring transactions for potential compliance violations
- **Tax**
  - Sales and use tax calculations
  - VAT return preparation and filing
  - Tax provision calculations
  - Transfer pricing data management

Human Resources

- **Onboarding/Offboarding**
  - Creating new employee records in HR systems
  - Provisioning IT access and equipment
  - Sending welcome emails and enrollment forms
  - Terminating accounts and reclaiming assets at offboarding
- **Payroll & Benefits**
  - Processing time and attendance data

- - Calculating payroll deductions and taxes
  - Generating payslips and direct deposit files
  - Enrolling employees in benefits plans
- **Tracking**
  - Vacation and leave request management
  - Performance review tracking and reminders
  - Compliance training completion tracking
  - Employee certification and license tracking
- **Recruitment**
  - Resume screening and filtering
  - Scheduling interviews
  - Sending offer letters and background check initiation
  - Updating applicant tracking systems (ATS)

Customer Service

- **Support Tickets**
  - Triaging tickets based on keywords and priority
  - Assigning tickets to appropriate agents
  - Fetching relevant data from knowledge bases
  - Automating routine resolutions (password resets, etc.)
  - Escalating complex tickets
- **Call Center**
  - Integrating with CTI systems to pull customer data
  - Updating customer records based on interactions
  - Generating call summaries and follow-up tasks
- **Chatbots**
  - Integrating with chat platforms
  - Handling Tier-1 inquiries (FAQs, order status)
  - Seamless handoff to live agents when needed
- **Order & Onboarding**
  - Processing new customer orders
  - Verifying customer information and credit checks
  - Setting up accounts in CRM systems
  - Sending order confirmations and tracking information
- **Complaints**
  - Logging complaints in a central system
  - Routing complaints based on category and severity
  - Tracking resolution progress and SLA compliance

Supply Chain & Logistics

- **Inventory & Forecasting**
  - Monitoring inventory levels across warehouses
  - Generating replenishment orders based on thresholds
  - Demand forecasting using sales data and historical trends
  - Safety stock optimization
- **Shipment Tracking**

- o Pulling shipment status updates from carrier systems
- o Sending proactive notifications to customers
- o Exception handling (delayed shipments, lost packages)
- **Vendor Management**
  - o Onboarding new vendors and collecting compliance documents
  - o Verifying vendor information against databases
  - o Tracking vendor performance metrics
- **Purchase Orders**
  - o Creating purchase orders based on requisitions
  - o Sending POs to vendors and tracking approvals
  - o Matching POs with invoices and goods receipts
- **Bill of Lading**
  - o Generating Bills of Lading with accurate shipment details

IT Operations

- **Monitoring**
  - o Real-time monitoring of server health (CPU, memory, etc.)
  - o Network traffic analysis and anomaly detection
  - o Proactive alerts for potential issues
- **Incident/Problem Management**
  - o Automated ticket creation in ITSM tools
  - o Diagnostics and initial troubleshooting steps
  - o Routing tickets to appropriate teams
  - o Known-error resolution
- **User Provisioning**
  - o Creating/disabling user accounts across systems (Active Directory, etc.)
  - o Granting access based on roles
  - o Password reset requests
- **Data & Cleanup**
  - o Migrating data between systems
  - o Cleansing data for accuracy and consistency
  - o Archiving old

Next Steps

1. **Process Assessment:** Identify high-volume, repetitive tasks suitable for automation.
2. **Proof of Concept:** Build a small-scale automation to test feasibility.
3. **ROI Calculation:** Estimate potential benefits.