



turbototic™

Turbototic User guide

Jan 2023

About

This document will first give you an introduction to the Turbotic platform. Then it will guide you through the administration portal and describe how to set up and customize Turbotic to start your journey with Turbotic. Finally, there is a chapter per module where functionality is described with user instructions.

Tech set up and installation guide please see document Technological Prerequisites.

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1 FAQ

How do I create a business case in Turbotic?

- In the Discovery module there are several business cases options, read more about the options [here](#).
- Create an [Auto business case](#)
- Create a [Quick business case](#)

How do I invite new users to Turbotic?

- There are two ways to invite a colleague to your environment: Add an existing Turbotic user as a guest or create a new user, please find the instructions [here](#).

Can I connect to several RPA vendors and tenants?

- Yes, connect all your environments/ tenants. For more information on the integration with vendors, see Tech Prerequisites.

How do I get KPI data in the Value module?

- To get KPI data in the Value module, some actions and details in the Control module are required. Please find the instructions [here](#).

Can I customize the business case metrics in the Discovery module?

- Yes, there are several parameters to choose from. You can find instructions on how to edit the business case metrics [here](#) and [here](#).

Can I customize the phases and statuses in the Discovery module?

- Yes, it is customizable through admin. Please find the instructions [here](#).

Can I customize the questionnaire template and checklist in the Discovery module?

- Yes, its template and checklists can be edited in settings.

Can I customize the phases, statuses, and checklist in the Build module?

- Yes, the template and checklists can be edited in settings. Please find the instructions [here](#).

How can I start a project in the Build module?

- To start a project in build one must create a Discovery project first.
- In the Discovery project, there are options for selecting technologies. One or more technologies must be selected to connect a solution to a Build project.

How do I add new functions and areas and edit them in Turbotic?

- All customizations are done on the settings page, please find the instructions for functions and areas [here](#).

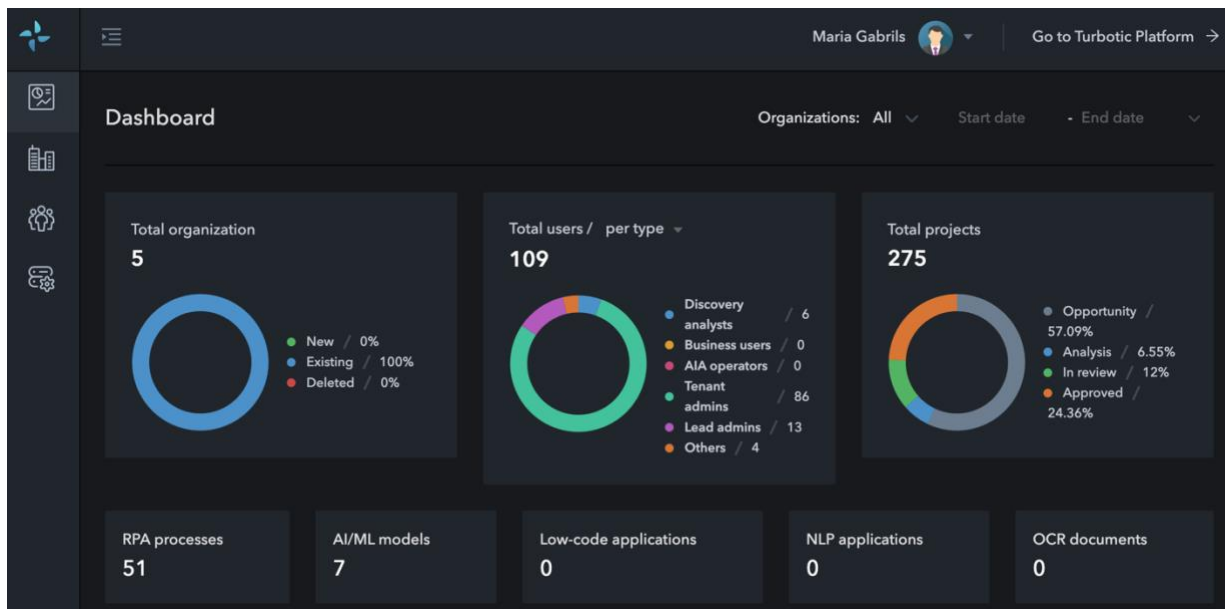
2 Admin

Admin has 8 different menu items, each of which offers a unique administration option. From the Admin page you can monitor the usage of the application and set up the basics for your Turbotic environment.

2.1 Dashboard

As a Tenant User landing page, the dashboard provides an at-a-glance overview of all key administration settings and tracked metrics.

- Data filterable by date
- List of all organizations your user has access to
- List of all users within the listed organizations for which the user has tenant rights
- List of all projects within the listed organizations for which the user has tenant rights
- Quick overview of your deployed technologies (RPA processes, AI models, Low Code applications, etc.)
- Quick access to the organization page



2.2 Organization Menu

The Organization menu provides a quick way to view and update your company-related data.

Turbotic as a platform can manage thousands of organizations with hundreds of users each. A user must be associated with an organization and a specific role. In order for the user to be assigned a role license, there must be a subscription that includes at least one lead administrator user license.

Going to a particular organization allows users to see the organization's overview page, which provides a summary of the organization's most important data. In the Organization **Profile** or **Address** submenu, users can easily update organization-related data.

2.3 Users Menu

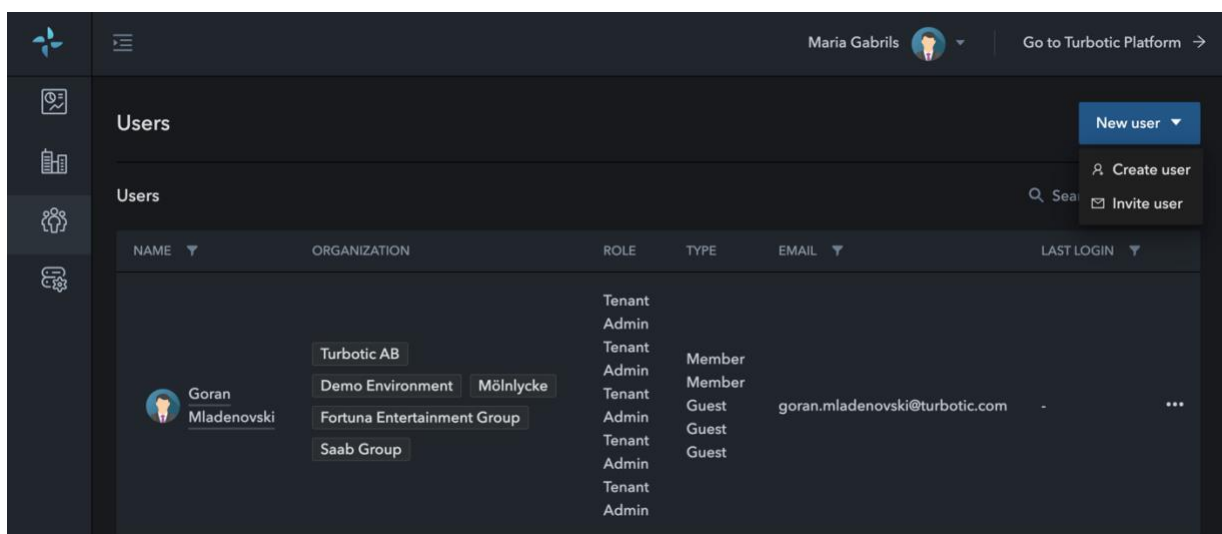
The Users menu helps you manage Turbotic Tenant users. There are two options for how organizations can manage their users: *Manual input* or *Connection to the organization's own AD/AAD*.

The manual approach allows you to fully control your users from the admin portal, while the AD/AAD connection gives you full control over your users from your central AD/AAD repository.

If a user email is already a Turbotic user, the user cannot be recreated, but must be invited as a guest to the new tenant.

To create a new user or update existing users, the tenant administrator can set or update the user's role. There are 5 options available:

- **Tenant admin** -> Lead Admin role + checkbox “Mark this account as Tenant admin” – Role that has full administration rights to both Admin and Turbotic
- **Lead Admin** - Role that has access to Turbotic only. It has full access to 4 modules though (DISCOVERY, BUILD, CONTROL and VALUE).
- **Discovery Analyst**- Role that has access to Turbotic only. It has read-write access to the data in the DISCOVERY module and read-only access to the data in the BUILD module.
- **AIA Operator** - Role that has access to Turbotic only. It has read-write access to the data in the BUILD and CONTROL modules and read-only access to the data in the VALUE module.
- **Business User** - Role that has access to Turbotic only. It has read-write access to the data in the VALUE module and read-only access to the data in the DISCOVERY and BUILD modules.



The screenshot displays the 'Users' management page in the Turbotic admin portal. The user 'Goran Mladenovski' is selected, and a dropdown menu is open, showing the following options:

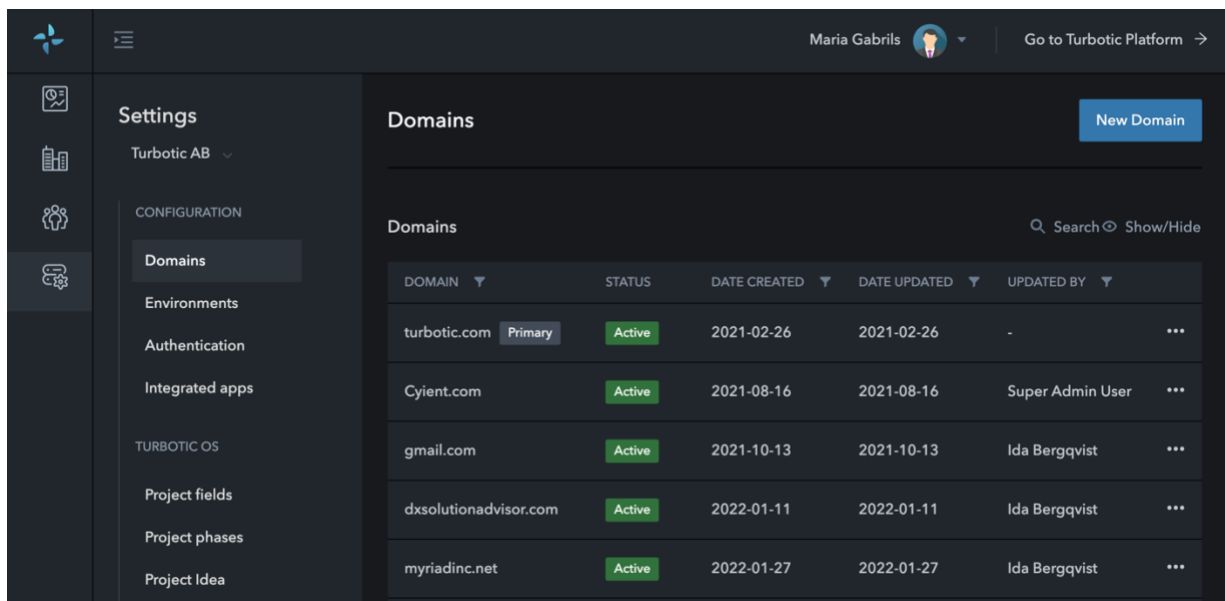
Role	Type
Tenant Admin	
Tenant Admin	Member
Tenant Admin	Member
Tenant Admin	Guest
Tenant Admin	Guest
Tenant Admin	Guest
Tenant Admin	Guest
Tenant Admin	
Tenant Admin	

2.4 Settings

Domains: The Organizations can specify and whitelist domains that should be allowed to access their organization.

Users can add new domains, but they cannot update their primary domain. Existing domains (except the primary one) can be inactivated. However, once a domain is set to inactive, it cannot be reactivated. Instead, a new domain must be created.

Environments: Turbotic is available as a SaaS solution, managed solution in the Azure or AWS cloud, or on your own private cloud/on-premises hardware. Once this setting is set, it cannot be changed. If needed, contact your sales representative to discuss a change.



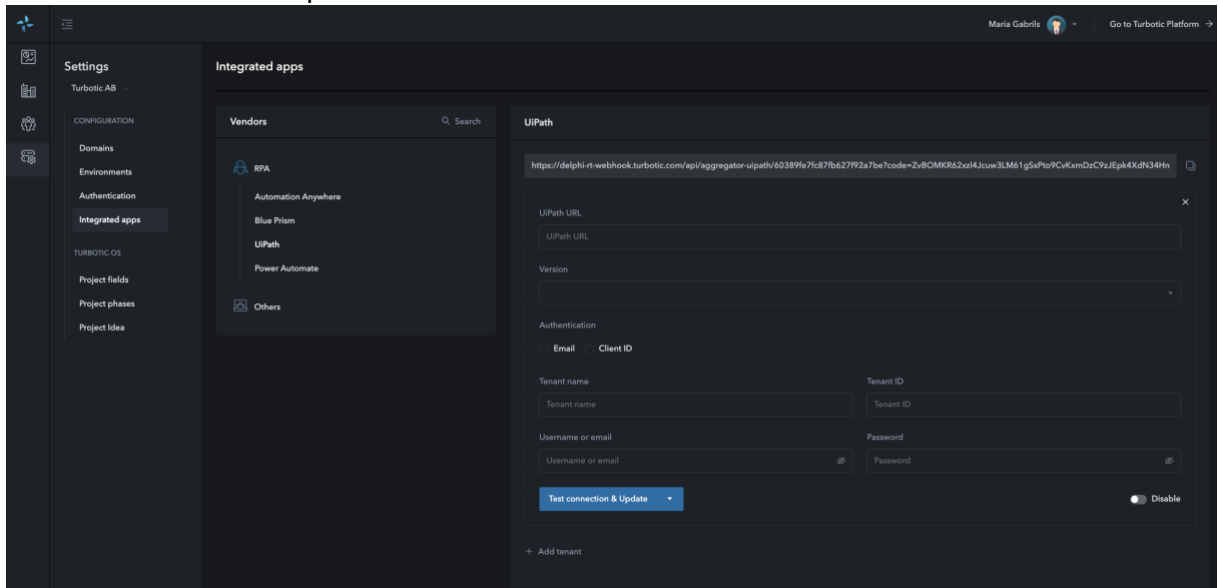
DOMAIN	STATUS	DATE CREATED	DATE UPDATED	UPDATED BY	
turbotic.com	Primary Active	2021-02-26	2021-02-26	-	...
Cyient.com	Active	2021-08-16	2021-08-16	Super Admin User	...
gmail.com	Active	2021-10-13	2021-10-13	Ida Bergqvist	...
dxsolutionadvisor.com	Active	2022-01-11	2022-01-11	Ida Bergqvist	...
myriadinc.net	Active	2022-01-27	2022-01-27	Ida Bergqvist	...

2.5 Integrated Apps

For more details on connection and the tech prerequisites in vendor side, please see document Technological Prerequisites.

2.5.1 UiPath

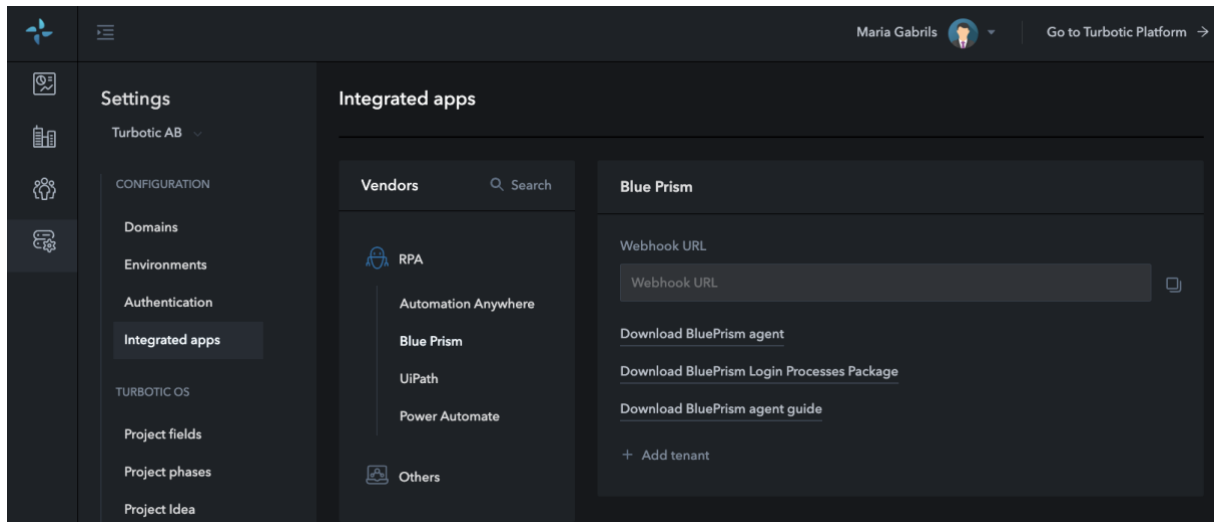
1. Go to Admin panel
2. Click on “Integrated apps” and then “UiPath”
3. Add Tenant
 - UiPath Tenant URL
4. Select authentication options:



- Email (using old way of API authentication)
 - Tenant name
 - Tenant ID - from URL
 - Username or Email – that TurboTic will use to get the API token
 - Password- that TurboTic will use to get API token
- Client ID (the new way of API authentication and using the Automation cloud)
 - Tenant name
 - Tenant ID – from URL
 - Client ID- follow [steps](#)
 - User Key – same steps as for Client ID

2.5.2 Blue Prism

1. Download the Blue Prism agent
2. Download the Blue Prism agent guide that will help you configure and set up the integration of Blue Prism with Turbotic.



2.5.3 Automation Anywhere

1. Select the Automation Anywhere version AA Enterprise or AA 360
2. Enter the Server URL that will be used to access the Automation Anywhere control room
3. Username and API key/password, which will be used to authenticate and authorize Turbotic to run AA APIs.

API key is used in case SSO is used on the AA tenant by the customer

2.5.4 Power Automate

1. Enter the Organization URL from the Power Automate Admin page >> Environments Environment URL
2. Enter the Tenant ID from the Application page >> Overview Directory ID
3. Client ID Application page >> Overview Application ID

2.5.5 Service Now

1. Go to the "System OAuth - Application Registry" page or use the search filter in the left panel and click "New Search"
2. Select the option: "Create an OAuth API endpoint for external clients"
3. Give the new application a name (you can add a value to the client secret field, or it will be auto generated)
4. Give the new user a name and password and click "Submit"
5. Select the "admin" role, assign it to the new user and click "Save"

3 Customizations

All modules are to some extent customizable, in this chapter the customizations are explained with instructions. All customizations for projects and the modules are done in

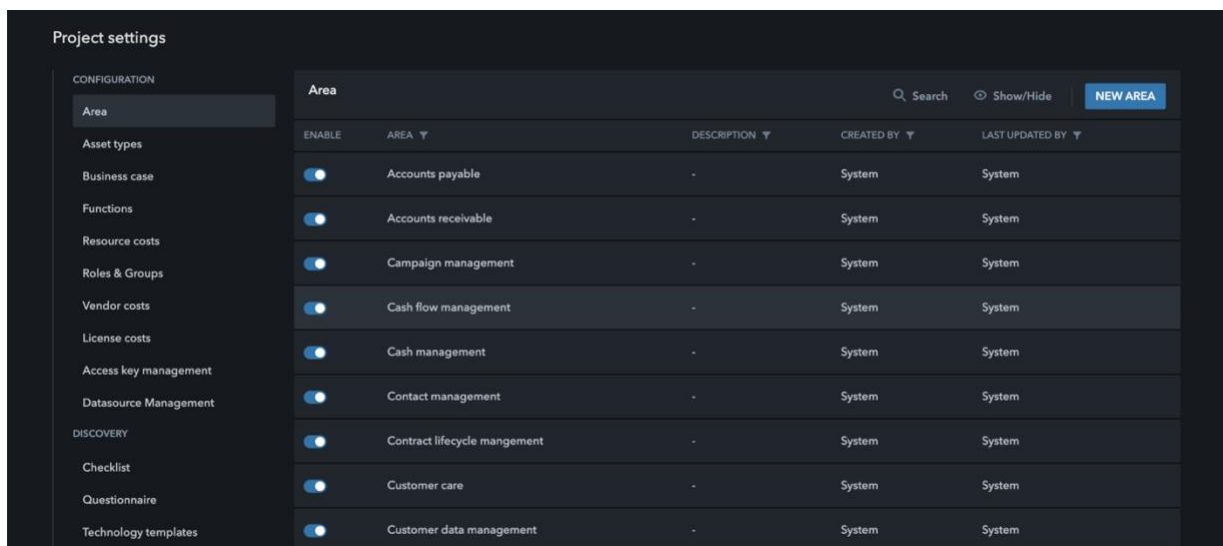
Project settings. For further customizations or requirements that are not available in settings, please contact product team.

3.1 Areas

Areas in Turbotic link the project to the part of the company that currently owns the process. There are a number of default Areas that can be used or create new areas as needed to reflect your organization. You can enable and disable areas, to adjust drop down of Areas selection of project in the different modules.

Instructions:

1. Click your account in the upper right corner and click "Settings" to get to the "Project Settings".
2. In the left menu you see different Project settings and under "Configuration" click "Area"
3. Click "New Area" in the top right corner if you want to add a new area. If you want to change existing areas, you can do so using the list of areas below.
4. Fill in the fields in the pop-up window and click "Create Area"
5. On the left side you can find buttons to enable/disable areas.



The screenshot shows the 'Project settings' interface. On the left is a navigation menu with categories like CONFIGURATION and DISCOVERY. The 'Area' option is selected under CONFIGURATION. The main area displays a table of configured areas with columns for ENABLE, AREA, DESCRIPTION, CREATED BY, and LAST UPDATED BY. A 'NEW AREA' button is visible in the top right of the table area.

ENABLE	AREA	DESCRIPTION	CREATED BY	LAST UPDATED BY
<input checked="" type="checkbox"/>	Accounts payable	-	System	System
<input checked="" type="checkbox"/>	Accounts receivable	-	System	System
<input checked="" type="checkbox"/>	Campaign management	-	System	System
<input checked="" type="checkbox"/>	Cash flow management	-	System	System
<input checked="" type="checkbox"/>	Cash management	-	System	System
<input checked="" type="checkbox"/>	Contact management	-	System	System
<input checked="" type="checkbox"/>	Contract lifecycle mangement	-	System	System
<input checked="" type="checkbox"/>	Customer care	-	System	System
<input checked="" type="checkbox"/>	Customer data management	-	System	System

3.2 Functions

Assign projects to the corresponding functions, e.g., Human Resources, Sales, Finance, etc. There are a number of default functions that can be used, or create new functions to reflect your organization, you can enable and disable areas for selection in the different modules.

Instructions:

1. Click your account in the upper right corner and click "Settings" to get to the "Project Settings".
2. In the left menu you see different Project settings and under "Configuration" click "Functions"
3. Click "New Functions" in the top right corner if you want to add a new function. If you want to change existing functions, you can do so using the list of functions below.
4. Fill in the fields in the pop-up window and click "Create Functions"
5. On the left side you can find buttons to enable/disable the organizations.

Project settings

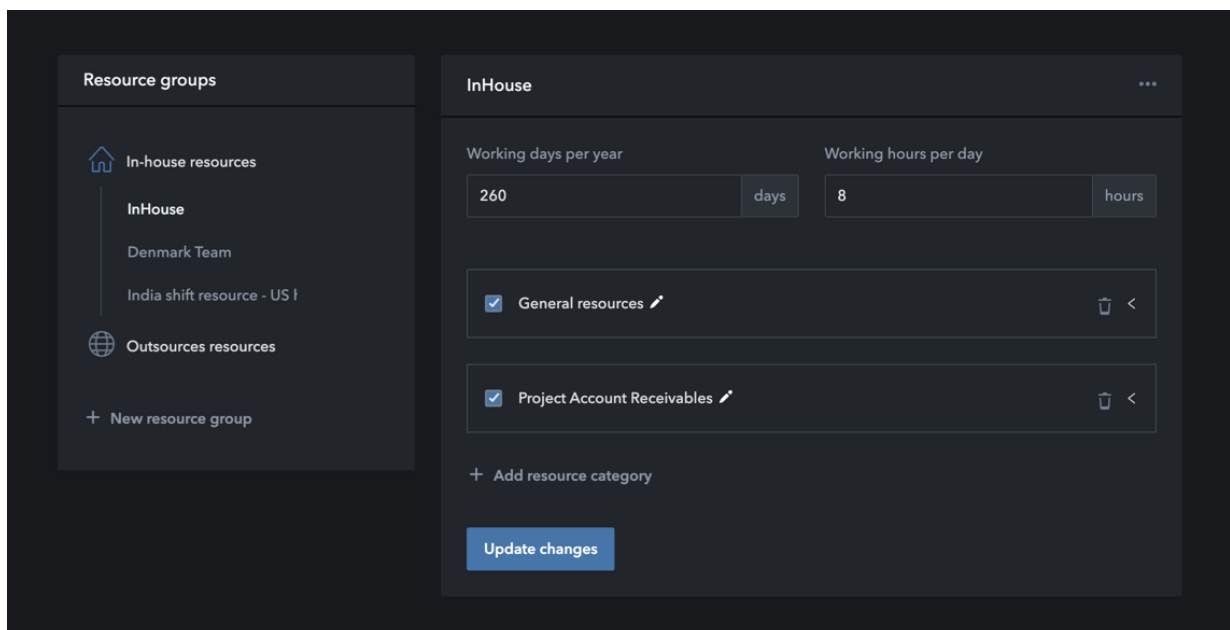
CONFIGURATION		Functions			
Area	ENABLE	FUNCTIONS	DESCRIPTION	CREATED BY	LAST UPDATED BY
Asset types	<input type="checkbox"/>				
Business case	<input checked="" type="checkbox"/>	After sales services	-	System	System
Functions	<input checked="" type="checkbox"/>	Marketing	-	System	System
Resource costs	<input checked="" type="checkbox"/>	Sourcing	-	System	System
Roles & Groups	<input checked="" type="checkbox"/>	Sales	-	System	System
Vendor costs	<input checked="" type="checkbox"/>	HR	-	System	System
License costs	<input checked="" type="checkbox"/>	IT	-	System	System
Access key management	<input checked="" type="checkbox"/>				
Datasource Management	<input checked="" type="checkbox"/>	Shared services	-	System	System
DISCOVERY	<input checked="" type="checkbox"/>	Product and Service Development	-	System	System
Checklist	<input checked="" type="checkbox"/>	Operations	-	System	System
Questionnaire	<input checked="" type="checkbox"/>				
Technology templates	<input checked="" type="checkbox"/>				

3.3 Resource costs

This section refers to the to-be costs of a Discovery business case. Here you can enter the project resource costs that will be retrieved for all future projects when using the automated business case. Enter all your project teams, In-house, Consultants, Internal, Outsourced, with the resource group General resources and resource roll in projects.

Instructions:

1. Click your account in the upper right corner and click "Settings" to get to the "Project Settings".
2. In the left menu you see different Project settings and under "Configuration" click "Resource cost"
3. Here you can edit all resource cost settings, such as teams and workings days per year. Click "New resource group" if you want to add a new resource group. Select In-house or Outsource resource.
4. Enter a "Resource Category" (e.g., "General resources", "Dev resources") and a "Resource type" (e.g., "Project manager", "Developer") and the role rate per time unit.

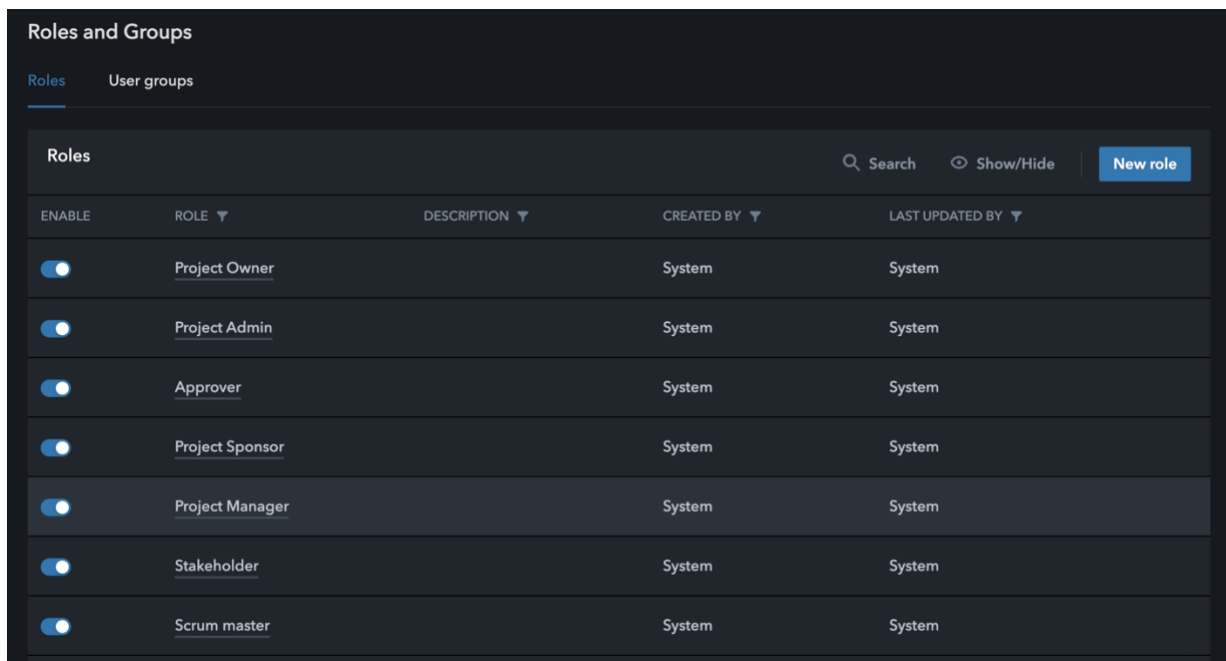


3.4 Roles & Groups

Turbotic users are assigned to specific roles that have pre-defined responsibilities in the system. However, the admin role can create a new role and decide what responsibilities and access this specific role should have. To use the new role, assign a new user to that role from the drop-down list.

Instructions:

1. Click your account in the upper right corner and click "Settings" to get to the "Project Settings".
2. In the left menu you see different Project settings and under "Configuration" click "Roles and Groups"
3. Click "New role" in the top right corner if you want to add a new role. Fill in the fields in the pop-up window and click "Create role"
4. If you want to add a new group, go to "User groups" and click "New Group". Then fill in the fields in the pop-up window and click "Create Group".
5. On the left side you can find buttons to enable/disable the roles.



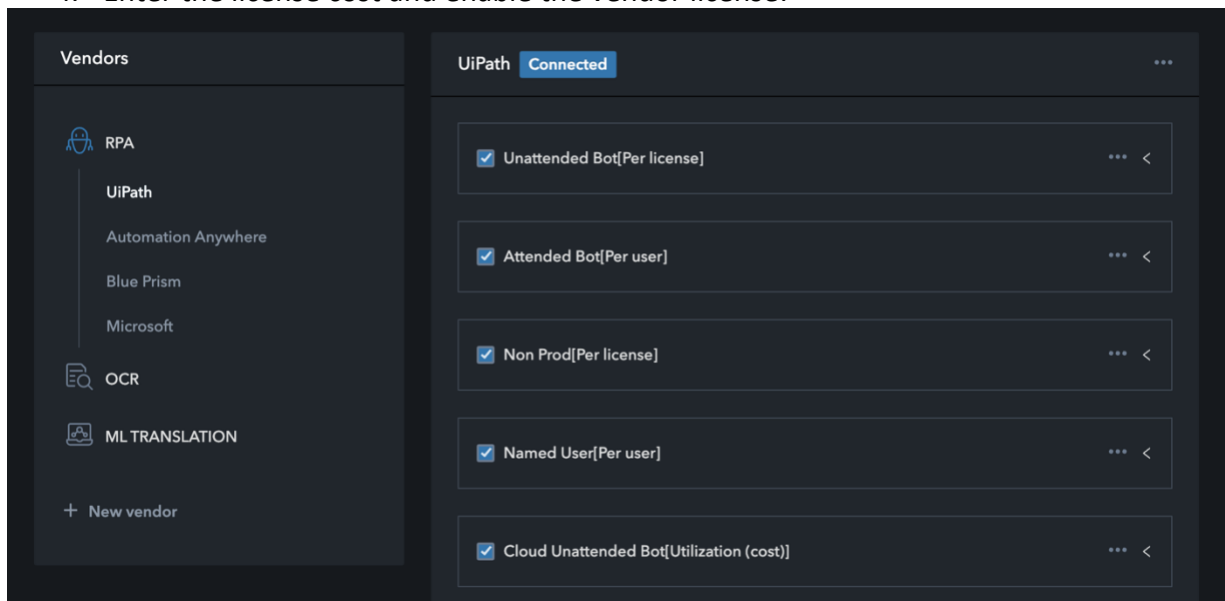
ENABLE	ROLE	DESCRIPTION	CREATED BY	LAST UPDATED BY
<input checked="" type="checkbox"/>	Project Owner		System	System
<input checked="" type="checkbox"/>	Project Admin		System	System
<input checked="" type="checkbox"/>	Approver		System	System
<input checked="" type="checkbox"/>	Project Sponsor		System	System
<input checked="" type="checkbox"/>	Project Manager		System	System
<input checked="" type="checkbox"/>	Stakeholder		System	System
<input checked="" type="checkbox"/>	Scrum master		System	System

3.5 Vendor costs

This section refers to the business case of a project. Here you can enter the vendor license costs that will be retrieved for all future projects when using the automated business case.

Instructions:

1. Click your account in the upper right corner and click "Settings" to get to the "Project Settings".
2. In the left menu you see different Project settings and under "Configuration" click "Vendor costs"
3. Add a new vendor or edit the license cost of an existing vendor. Select the license type.
4. Enter the license cost and enable the vendor license.

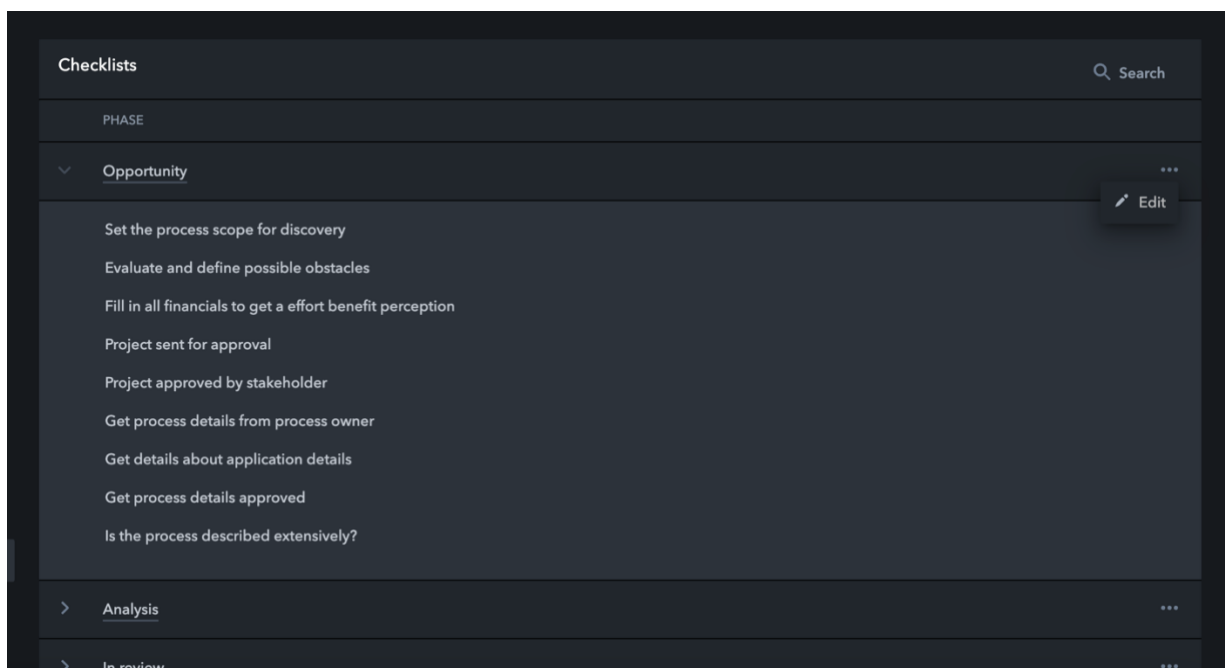


3.6 Discovery Checklist

The Discovery checklist is intended to assist the user in performing a proper analysis in the Discovery process. It ensures that the way of working is followed, and best practices are applied to each project.

How to guide:

1. Click your account in the upper right corner and click "Settings" to get to the "Project Settings".
2. In the left menu you see different Project settings and under "Discovery" click "Checklist"
3. Click the drop-down arrow on the left to view the current steps of each phase. Click the three dots on the right to edit a phase and add new steps and actions.

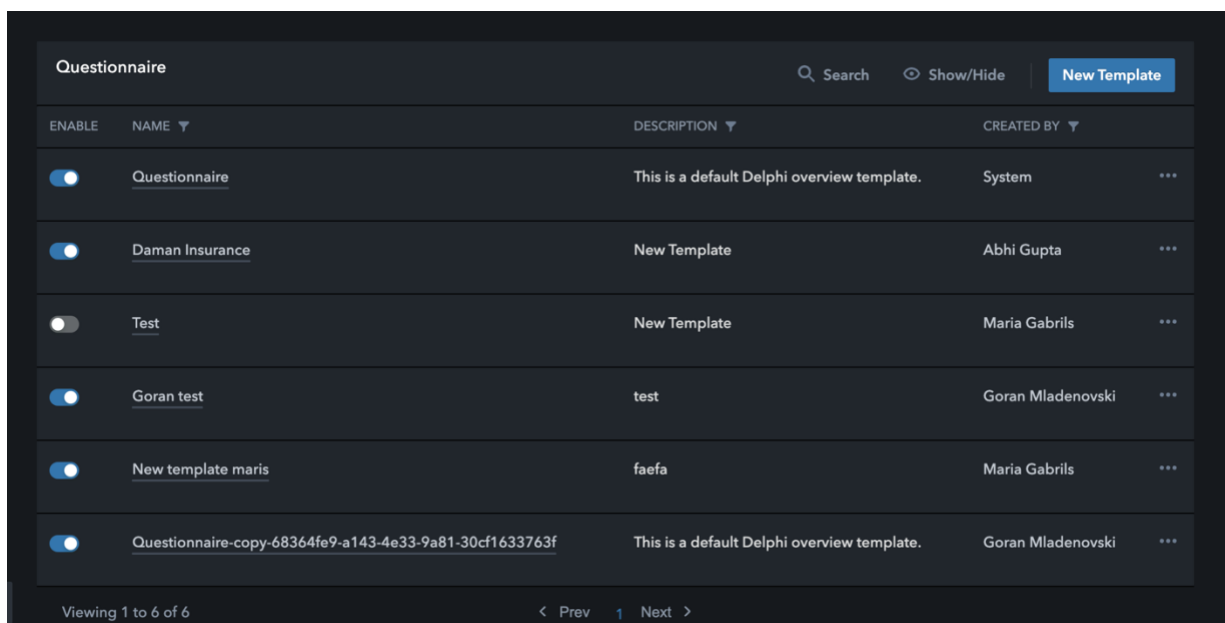


3.7 Discovery Questionnaire

The Discovery Questionnaire is a set of questions that can be used to capture information about the processes involved in analyzing automation potential or managing a build project. Turbotic has best-practice templates but can also be customized to fit the company's methodology and standard. The questionnaire is selected when creating a project in Discovery, have several templates and select template for project type, if needed.

Instructions:

1. Click your account in the upper right corner and click "Settings" to get to the "Project Settings".
2. In the left menu you see different Project settings and under "Discovery" click "Questionnaire"
3. Here you can create a new template or use our default templates.
4. Click "New template" in the top right corner if you want to add a new template. Fill in the fields in the pop-up window and click "Create template"



Questionnaire			
ENABLE	NAME	DESCRIPTION	CREATED BY
<input checked="" type="checkbox"/>	Questionnaire	This is a default Delphi overview template.	System
<input checked="" type="checkbox"/>	Daman Insurance	New Template	Abhi Gupta
<input type="checkbox"/>	Test	New Template	Maria Gabrils
<input checked="" type="checkbox"/>	Goran test	test	Goran Mladenovski
<input checked="" type="checkbox"/>	New template maris	faefa	Maria Gabrils
<input checked="" type="checkbox"/>	Questionnaire-copy-68364fe9-a143-4e33-9a81-30cf1633763f	This is a default Delphi overview template.	Goran Mladenovski

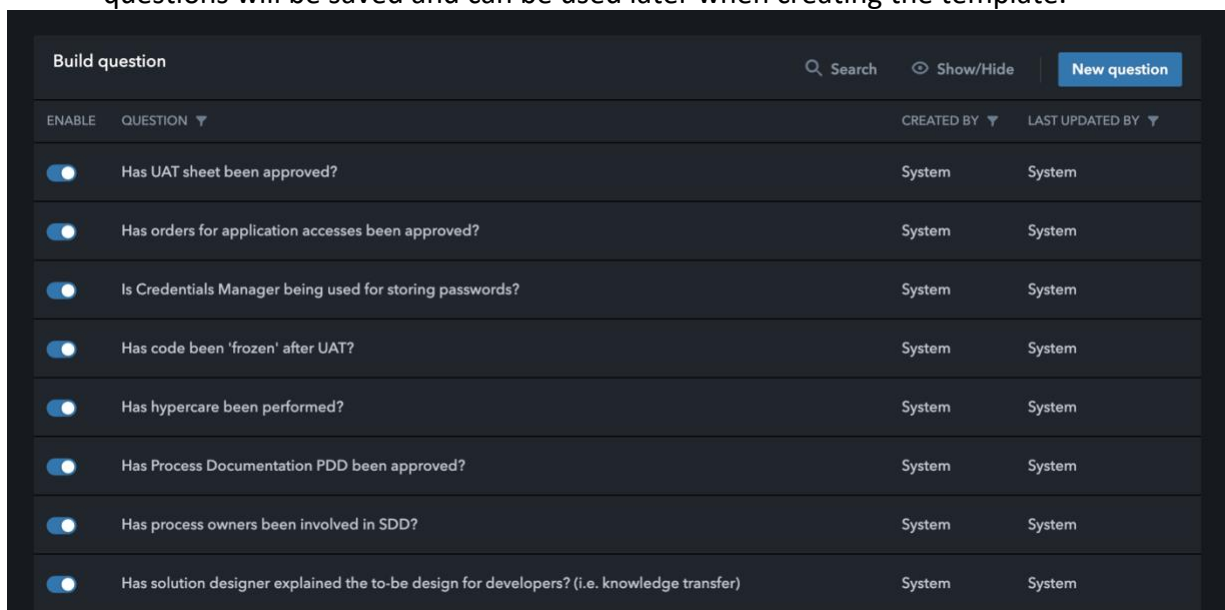
Viewing 1 to 6 of 6 < Prev 1 Next >

3.8 Build Questions

“Build Questions” works as a checklist of steps required for the successful implementation of automation solutions. The list is intended as a project management tool and is based on best practices. However, the templates can be customized.

Instructions:

1. Click your account in the upper right corner and click "Settings" to get to the "Project Settings".
2. In the left menu you see different Project settings and under “Build” click “Questions”
3. Click “New question” in the top right corner if you want to add a new question. Enter the question in the pop-up window and click “Create question”
4. On the left side you can find buttons to enable/disable the default options. The questions will be saved and can be used later when creating the template.



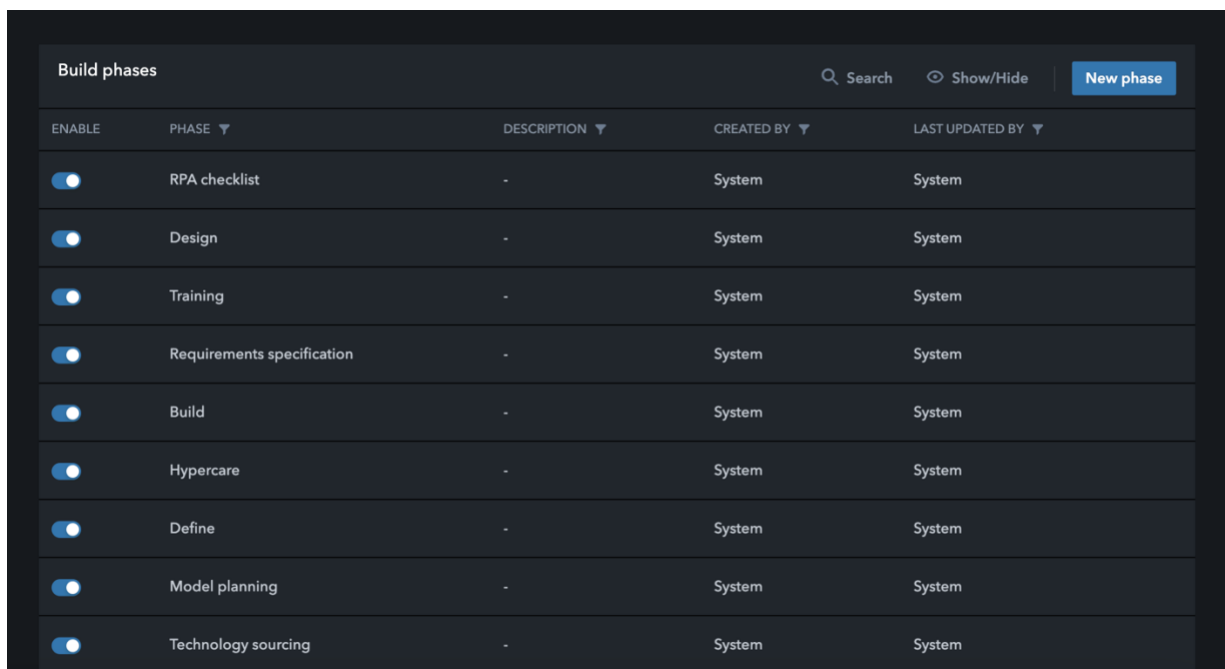
ENABLE	QUESTION	CREATED BY	LAST UPDATED BY
<input checked="" type="checkbox"/>	Has UAT sheet been approved?	System	System
<input checked="" type="checkbox"/>	Has orders for application accesses been approved?	System	System
<input checked="" type="checkbox"/>	Is Credentials Manager being used for storing passwords?	System	System
<input checked="" type="checkbox"/>	Has code been 'frozen' after UAT?	System	System
<input checked="" type="checkbox"/>	Has hypercare been performed?	System	System
<input checked="" type="checkbox"/>	Has Process Documentation PDD been approved?	System	System
<input checked="" type="checkbox"/>	Has process owners been involved in SDD?	System	System
<input checked="" type="checkbox"/>	Has solution designer explained the to-be design for developers? (i.e. knowledge transfer)	System	System

3.9 Build phases

"Build phases" is a set of phases that must be performed for the successful implementation of automation solutions. The list is intended as a project management tool and is based on best practices. However, the templates can be customized.

Instructions:

1. Click your account in the upper right corner and click "Settings" to get to the "Project Settings".
2. In the left menu you see different Project settings and under "Build" click "Phases"
3. Click "New phase" in the top right corner if you want to add a new phase. Fill in the details in the pop-up window and click "Create phase"
4. On the left side you can find buttons to enable/disable the phases.



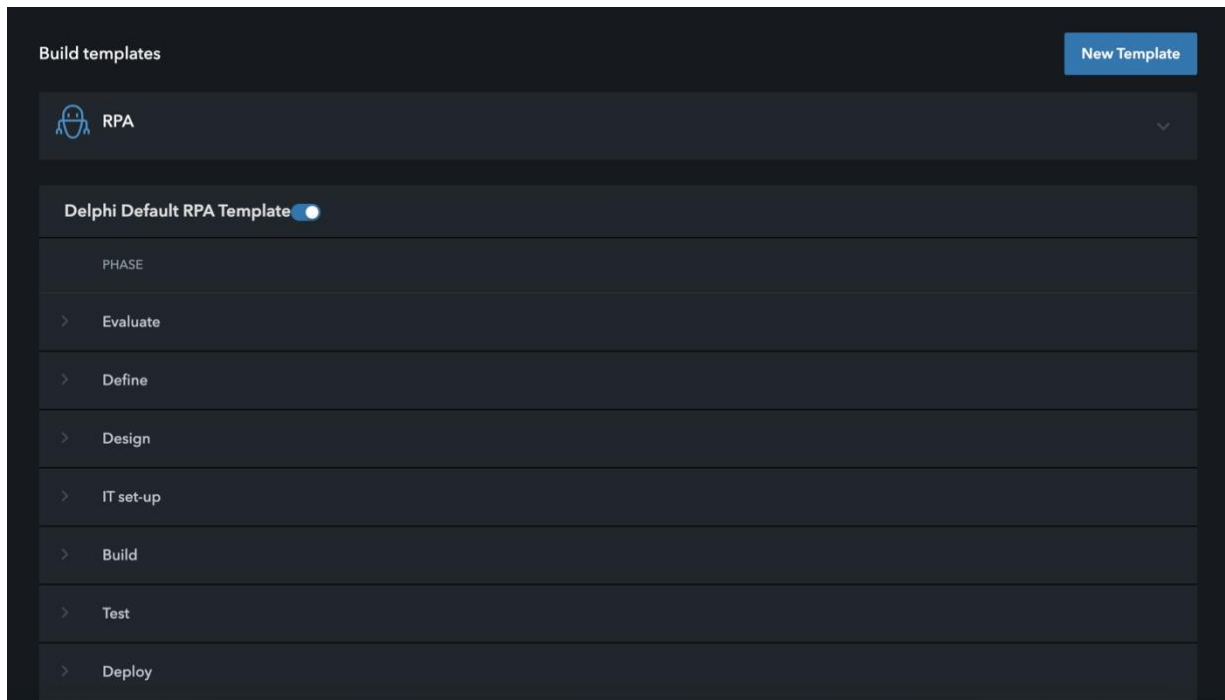
ENABLE	PHASE	DESCRIPTION	CREATED BY	LAST UPDATED BY
<input checked="" type="checkbox"/>	RPA checklist	-	System	System
<input checked="" type="checkbox"/>	Design	-	System	System
<input checked="" type="checkbox"/>	Training	-	System	System
<input checked="" type="checkbox"/>	Requirements specification	-	System	System
<input checked="" type="checkbox"/>	Build	-	System	System
<input checked="" type="checkbox"/>	Hypercare	-	System	System
<input checked="" type="checkbox"/>	Define	-	System	System
<input checked="" type="checkbox"/>	Model planning	-	System	System
<input checked="" type="checkbox"/>	Technology sourcing	-	System	System

3.10 Build tech templates

Templates are a set of questions that can be used to capture information about the processes involved in analyzing automation potential or managing a build project. Turbotic has best-practice templates but can also be customized to fit the company's methodology and standard. The templates are related to a specific technology and is selected when creating a project.

Instructions:

1. Click your account in the upper right corner and click "Settings" to get to the "Project Settings".
2. In the left menu you see different Project settings and under "Build" click "Templates"
3. Here you can choose to customize your template or to use our default templates.
4. Click "New Template" in the top right corner if you want to add a new template. Fill in the fields in the pop-up window, assign the template to a technology from the drop-down list, and click "Create build template".

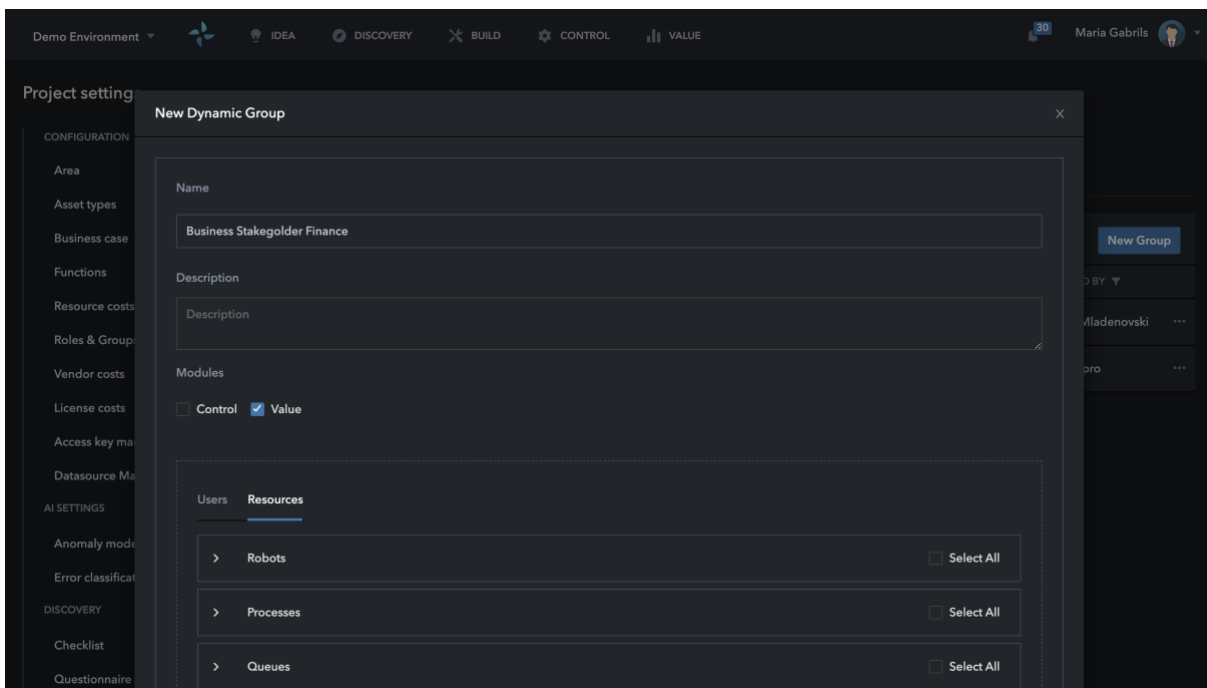


3.11 Access

This section is an advanced access control settings page, you create groups and assign specific Turbotic access to projects.

Instructions:

1. Click your account in the upper right corner and click "Settings" to get to the "Project Settings".
2. In the left menu you see different Project settings and under "Control" click "Access".
3. Go to "Other groups" and create a new user group to assign users to.
4. Go to "Assignments" to allocate accesses or view your accesses.

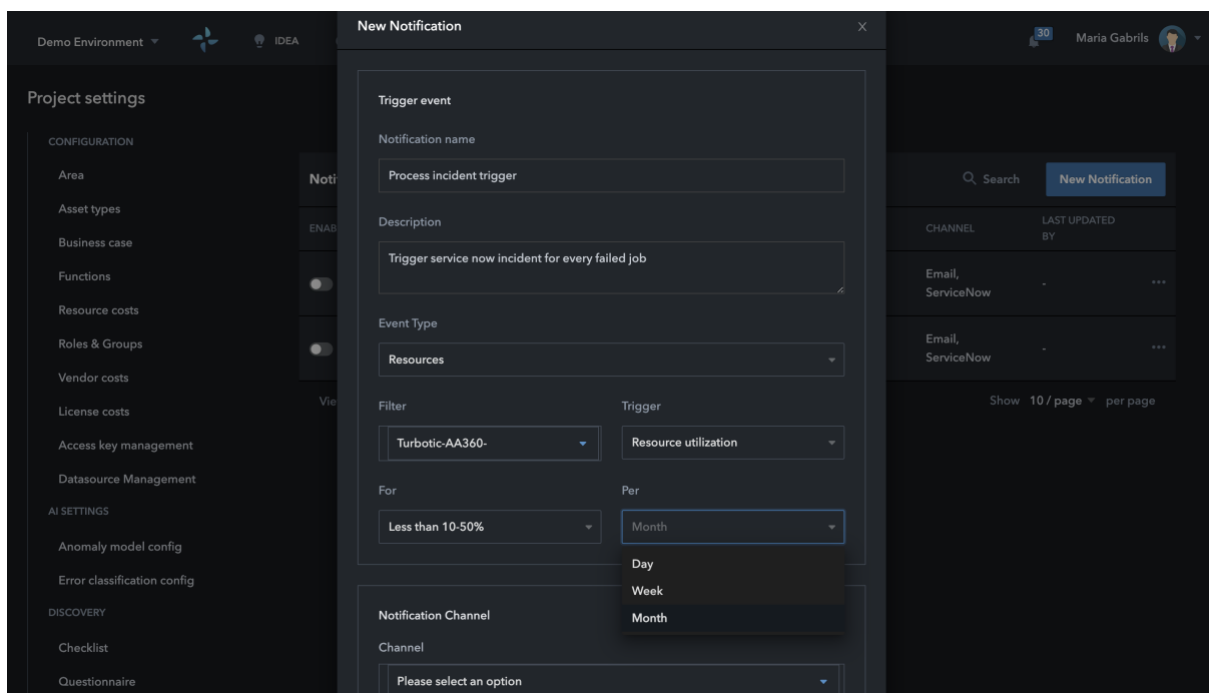


3.12 Incident management

Incident management or notification management page is where you set the global rules for how and when notifications or incidents are automatically sent by Turbotic.

Instructions:

1. Click your account in the upper right corner and click "Settings" to get to the "Project Settings".
2. In the left menu you see different Project settings and under "Control" click "Incident management"
3. To create new notification rule, click "New notification" and enter details and rules.
4. There are several options for a triggering a notification, from Process, Queue, Resources and Robot events.

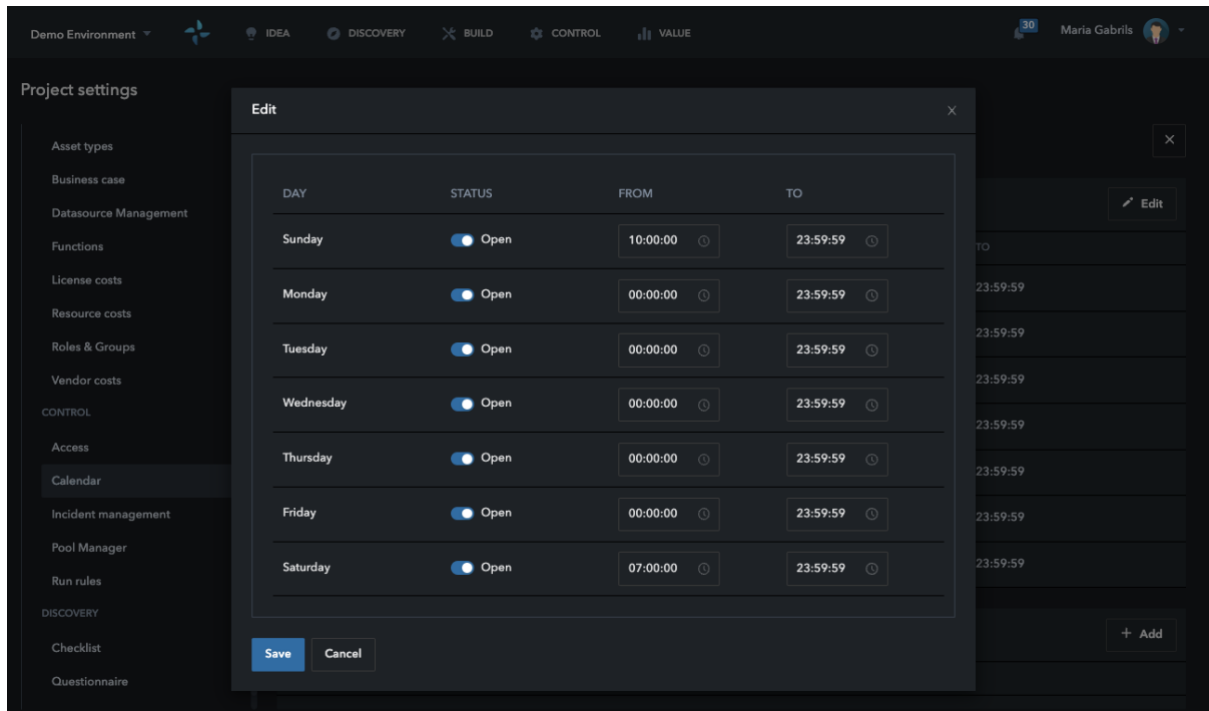


3.13 Run manager calendar

Ensure that the Run flow and Turbotic Orchestrating capabilities captures all exceptions for bank holiday and service windows for applications and servers.

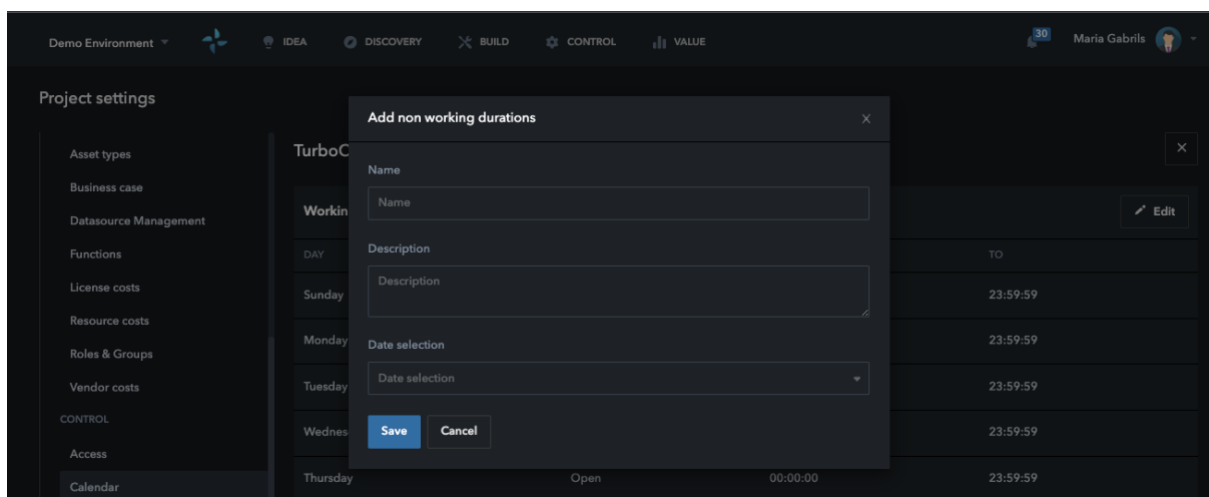
Working hours

Set the working hours for when the orchestration of processes can be executed in Turbotic.



Non-working hours / Service Window

Add the time slots when applications or VM should not be used for orchestration of processes.



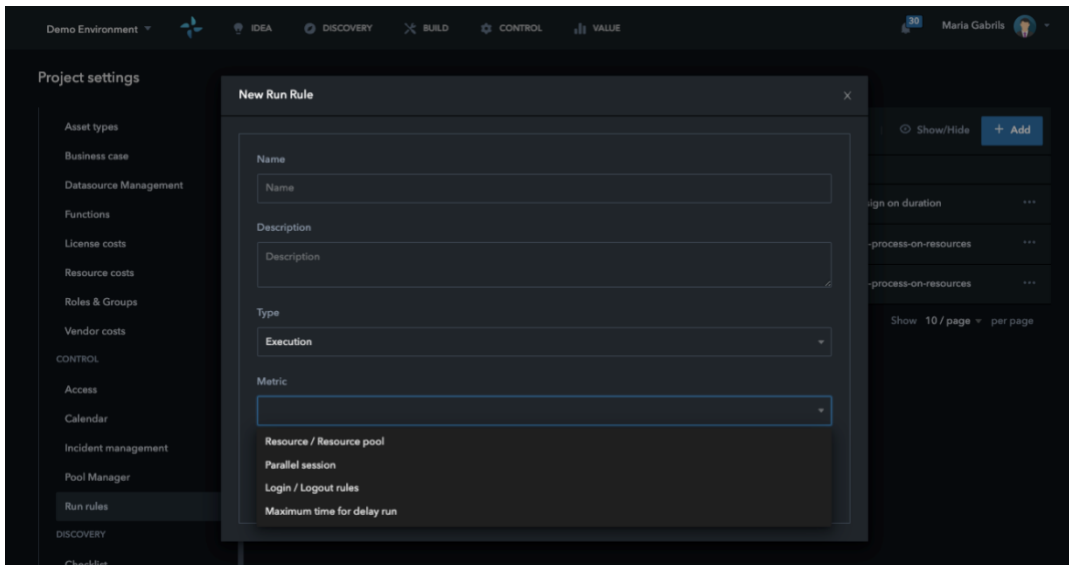
3.14 Run manager rules

Set the global rules for all processes execution, recovery, and notification rules.

Execution rules are rules for how the process should be executed, select rules for:

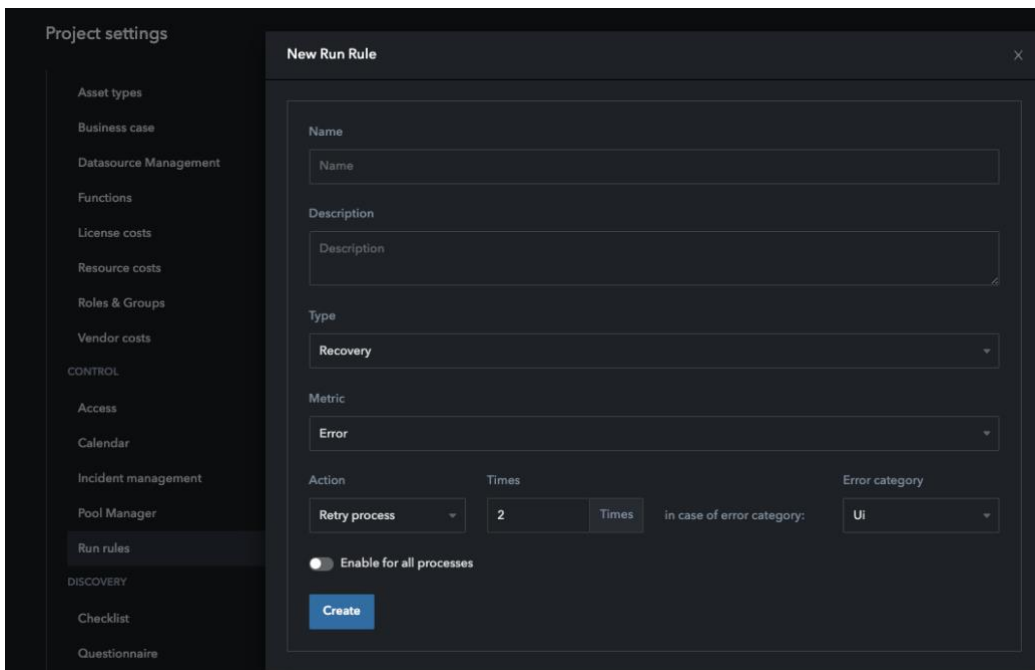
- Resources

- Parallel sessions
- Login logout
- Max time for a delay in execution



Recovery rules are rules for how the process should be handled in case of unexpected events. Set rules for:

- Error
- Process duration
- Process interruption



Notification rules are rules for how to get notified by Turbotic, there are different metrics and triggers that can be applied to the notification rules.

- Process
- Queue

- Robot
- Resources

Project settings

- Asset types
- Business case
- Datasource Management
- Functions
- License costs
- Resource costs
- Roles & Groups
- Vendor costs
- CONTROL
- Access
- Calendar
- Incident management
- Pool Manager
- Run rules**
- DISCOVERY
- Checklist
- Questionnaire

New Run Rule

Name

Description

Type

Notification

Metric

Resources

Filter

Please select an option

Trigger

Resource in disconnect state for

For

1

Unit

Hours

Notification Channel

Channel

Email

Email

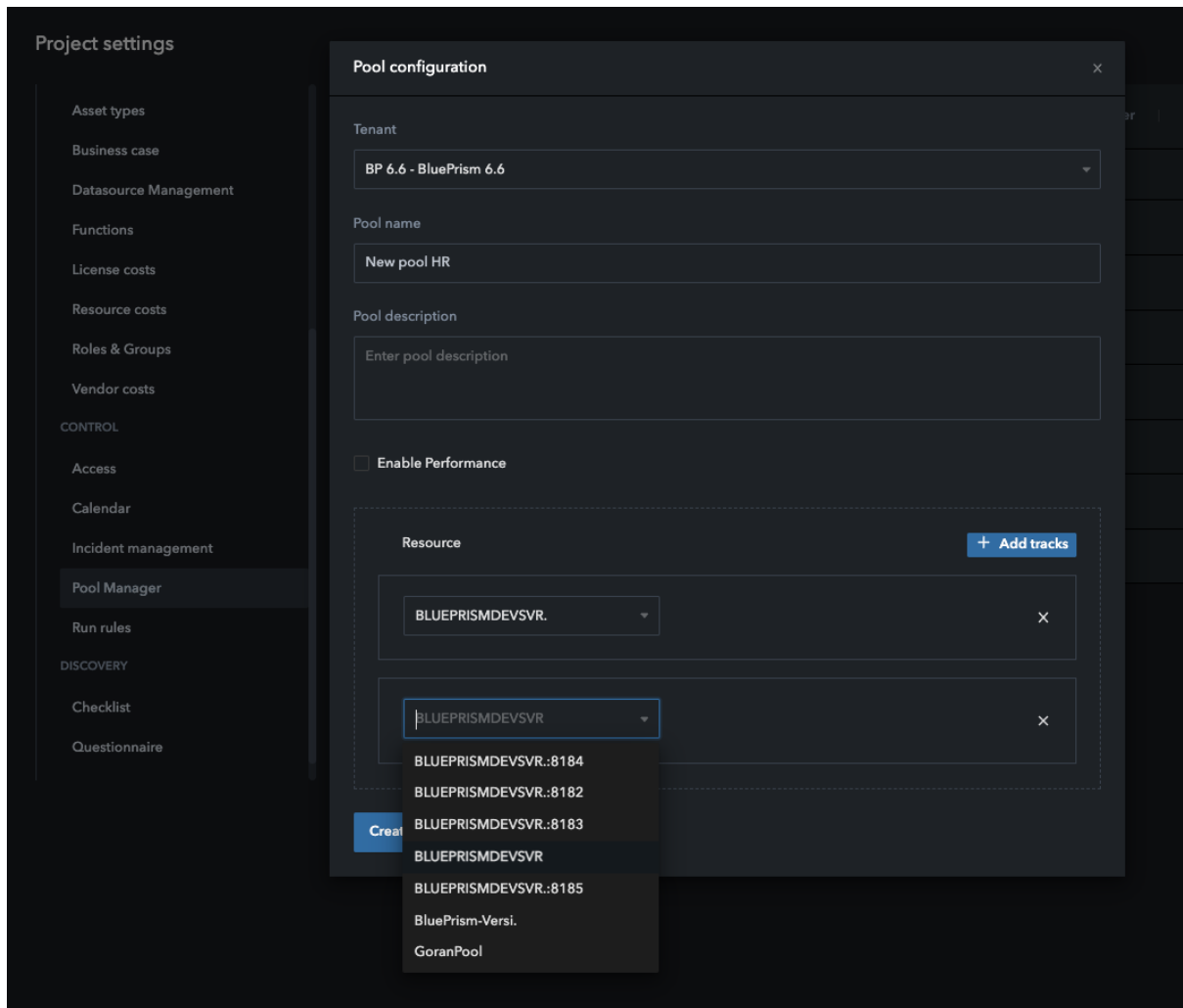
Select an option

Enable for all processes

Create

3.15 Pool manager

Allocate resources to a pool to ensure that Turbotic can optimize resources utilization and to ensure segregation of duties.



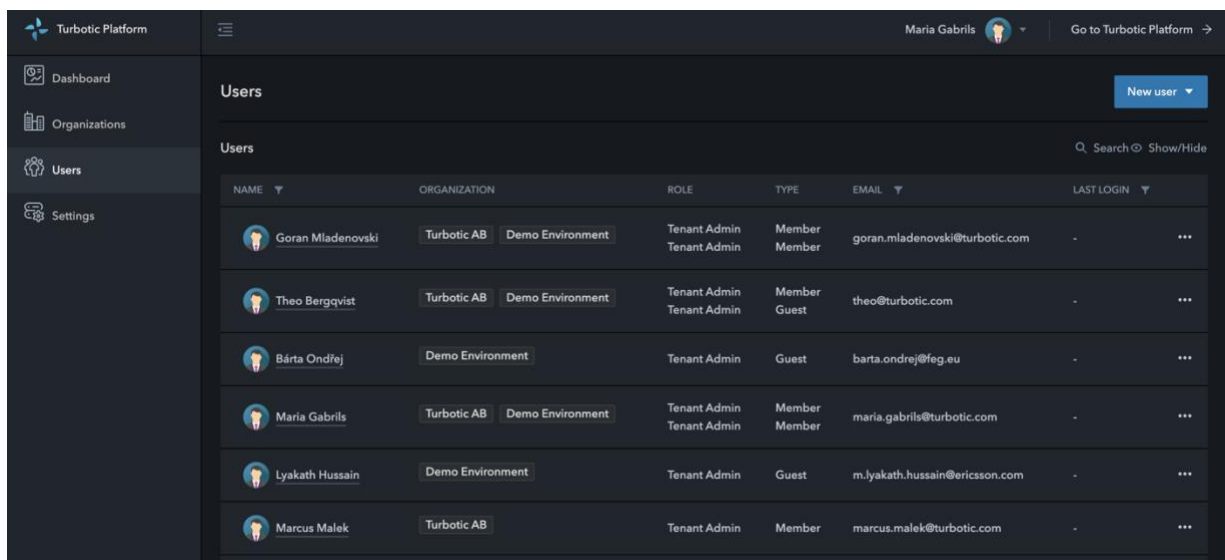
4 Idea

4.1 Invite business users to Idea module

Invite users from the business to create their own automation ideas. The Idea box role is free of charge and offers other stakeholders in the organization to assist in creating a project funnel.

Instructions:

1. Click your account in the top right corner and enter “Users”.
2. Click “New User” in the top right corner.
3. You will be redirected to a new page (The admin panel) where you click “New User” in the top right corner again.
4. When clicking create new user you will need to fill out the pop-up with information.
 - Choose Idea box as role.



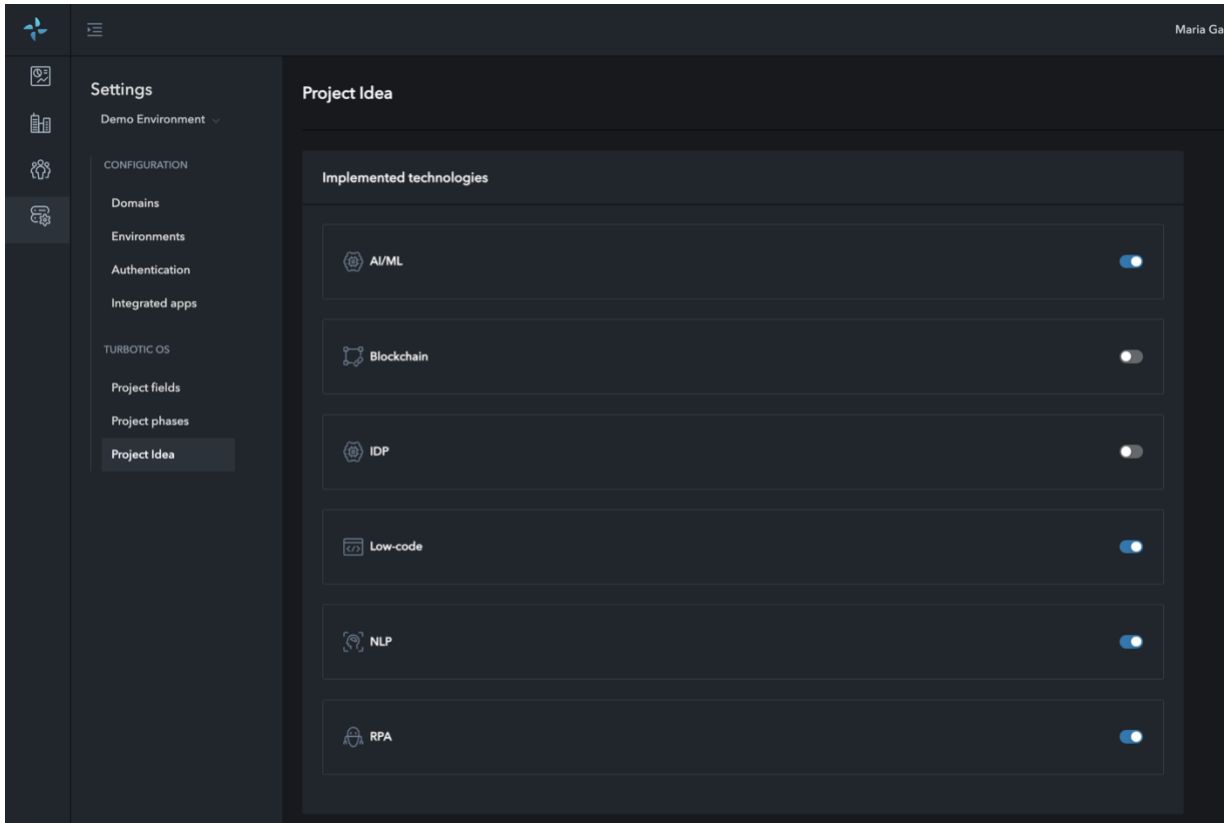
NAME	ORGANIZATION	ROLE	TYPE	EMAIL	LAST LOGIN
Goran Mladenovski	Turbotic AB Demo Environment	Tenant Admin Tenant Admin	Member Member	goran.mladenovski@turbotic.com	-
Theo Bergqvist	Turbotic AB Demo Environment	Tenant Admin Tenant Admin	Member Guest	theo@turbotic.com	-
Bárta Ondřej	Demo Environment	Tenant Admin	Guest	barta.ondrej@feg.eu	-
Maria Gabrils	Turbotic AB Demo Environment	Tenant Admin Tenant Admin	Member Member	maria.gabrils@turbotic.com	-
Lyakath Hussain	Demo Environment	Tenant Admin	Guest	m.lyakath.hussain@ericsson.com	-
Marcus Malek	Turbotic AB	Tenant Admin	Member	marcus.malek@turbotic.com	-

4.2 Customize technology recommendations

In Idea module there is a feature that gives a process a technology recommendation, a technical feasibility assessment that is based on 10 questions. To get proper recommendations that suits your organization and technology portfolio, this can be customized in the Admin page.

Instructions:

1. Go to Settings
2. Go to Project Idea
3. Enable the technologies you want recommendations for
4. Disable the technologies you do not want recommendations for



The screenshot shows the Turbotic Settings interface. On the left is a sidebar with a 'Settings' menu. Under 'Settings', there is a 'Demo Environment' dropdown and a 'CONFIGURATION' section. The 'CONFIGURATION' section includes 'Domains', 'Environments', 'Authentication', and 'Integrated apps'. Below that is the 'TURBOTIC OS' section, which includes 'Project fields', 'Project phases', and 'Project Idea' (which is currently selected). The main content area is titled 'Project Idea' and contains a section for 'Implemented technologies'. This section lists six technologies with their respective toggle switches: AI/ML (on), Blockchain (off), IDP (off), Low-code (on), NLP (on), and RPA (on).

Technology	Status
AI/ML	On
Blockchain	Off
IDP	Off
Low-code	On
NLP	On
RPA	On

5 Discovery

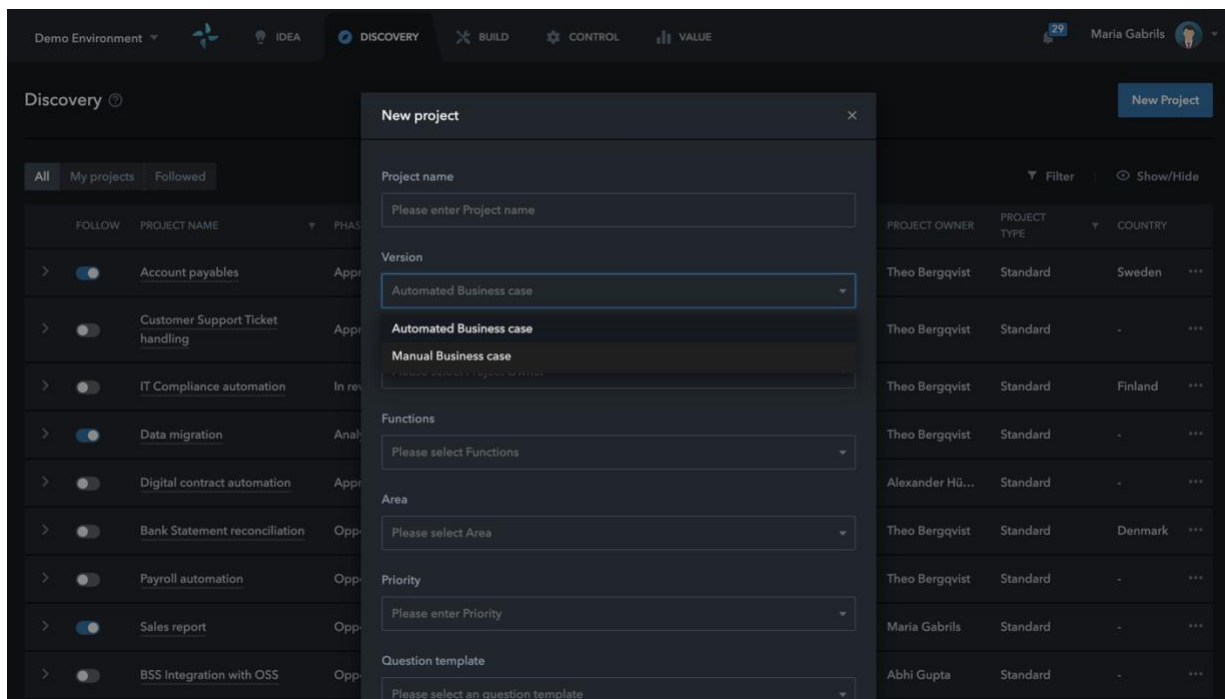
A discovery project is where you evaluate an automation opportunities potential to be automated. Here you map out the process by answering questions and info. This is also where you set KPI's and build a business case which is what is used later once the solution is implemented and you can measure the real-time value. You can find in this slide how to populate a discovery project.

5.1 Start discovery project

Create new Discovery project in the Discovery module or convert an Idea into a project.

Instructions:

1. Enter the discovery module and click “New Project” In the top right corner.
2. Enter the pop-up form with info. If you want to change or add functions, Areas or the question template before filling this in, refer to the related slides, Functions, Areas, Question templates.



The screenshot shows the Turbotic Discovery module interface. A 'New project' form is open in the center, overlaying a list of existing projects. The form contains the following fields:

- Project name:** A text input field with the placeholder 'Please enter Project name'.
- Version:** A dropdown menu with 'Automated Business case' selected.
- Automated Business case:** A section header.
- Manual Business case:** A section header with a sub-note 'Please select a project owner'.
- Functions:** A dropdown menu with the placeholder 'Please select Functions'.
- Area:** A dropdown menu with the placeholder 'Please select Area'.
- Priority:** A dropdown menu with the placeholder 'Please enter Priority'.
- Question template:** A dropdown menu with the placeholder 'Please select an question template'.

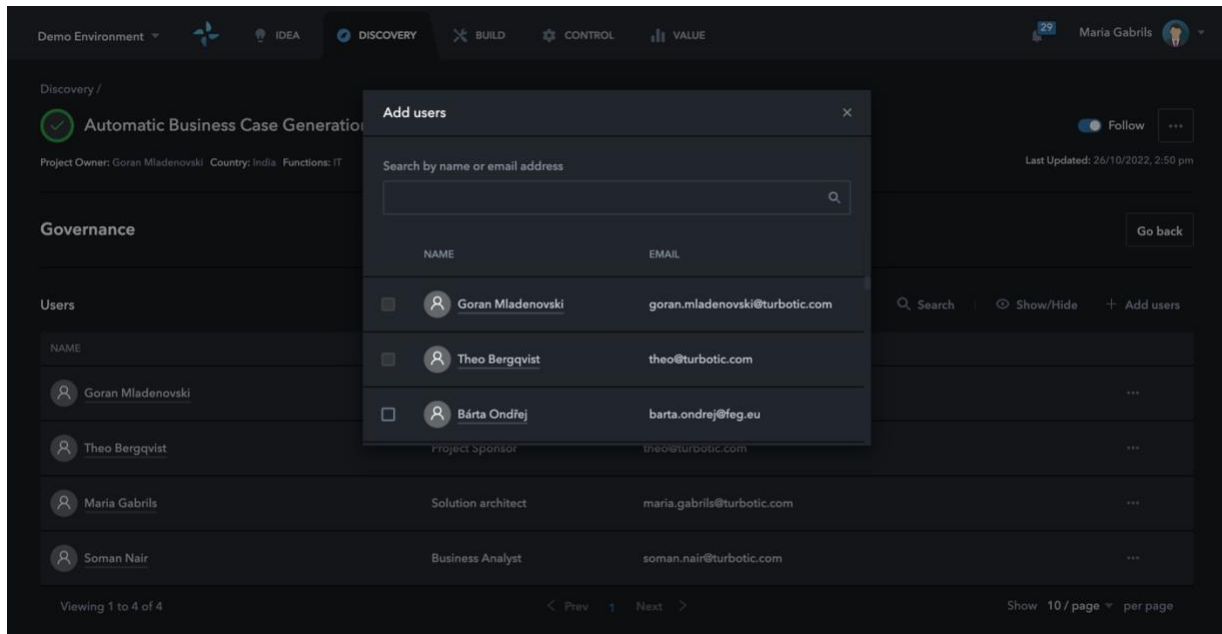
The background shows a list of projects with columns for 'FOLLOW', 'PROJECT NAME', 'PHASE', 'PROJECT OWNER', 'PROJECT TYPE', and 'COUNTRY'. The user 'Maria Gabrils' is logged in, and a 'New Project' button is visible in the top right corner.

5.2 Invite colleagues to your project

Invite a colleague to work in Turbotic by attaching the appropriate role in an email invite.

Instructions:

1. Open a Discovery project
2. Click on Governance on the left side bar
3. Search for a user and set propitiiate role for a project member or stakeholder



5.3 Business case options

There are 3 different business case options in Discovery:

Automated Business case

Advanced

- Enter as-is and to-be data to generate a detailed Business case data and chart
- Pre req. License costs and resource costs in settings page

Quick

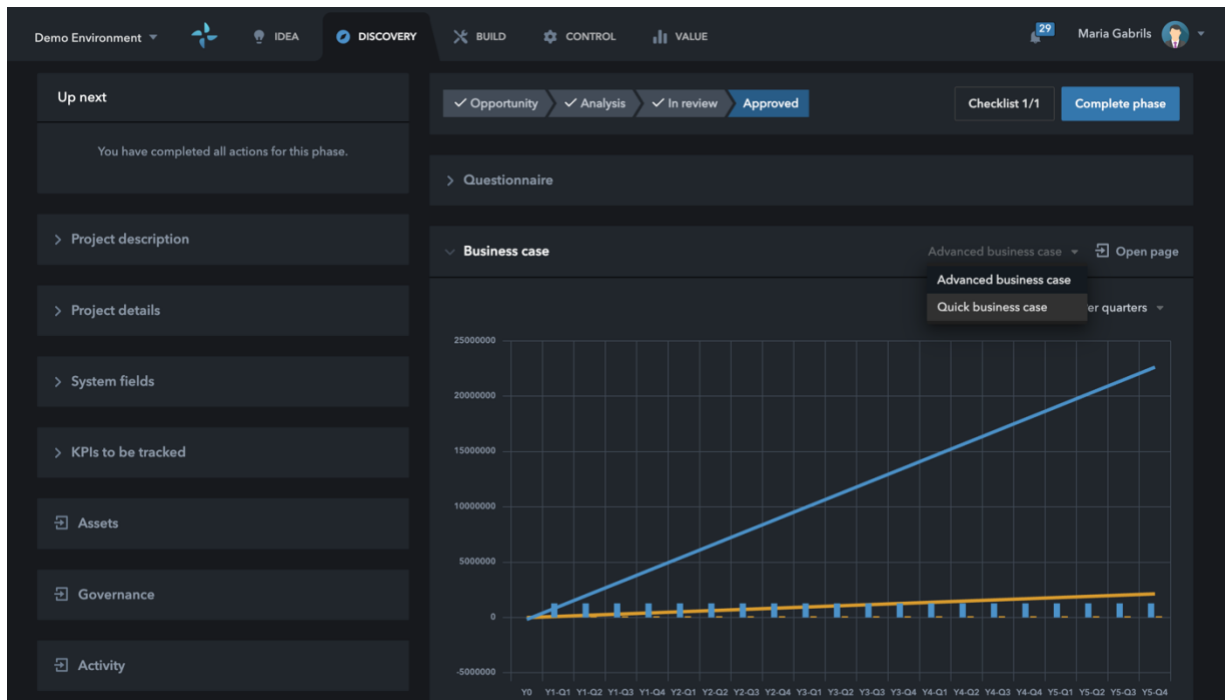
- Manually enter benefits, costs and investment to generate Business case data and chart

Manual Business case

- Manually all data points and Business case to generate chart

5.4 Advanced BC

In the advanced business case, all functionalities and data fields should be populated for fully detailed version. Although if all data is not at hand, nor not needed, fields can be left empty. As per your need. Make the Business case as detailed or simple as per your preference.



Instructions:

1. Prerequisites
 - Set Resource costs link
 - Set vendor cost link
2. Create a Discovery project
- 2a. Create automated business case
 - Click on "New project"
 - Enter details in popup
 - Select version "Automated Business case"
- 2b. Select advanced Business case
 - Go to "Business case"
 - Select "Advanced business case"
 - Click on "Open page"
3. As-is process data
- 3a. Add one or several sub processes
 - If the process can be divided into several part processes, create one sub processes per part.
- 3b. Enter AS-IS data and save
 - Process details – enter data on how the process executed today.
 - Process costs – enter data on cost related to the process.

- FTE details – enter data on FTE data

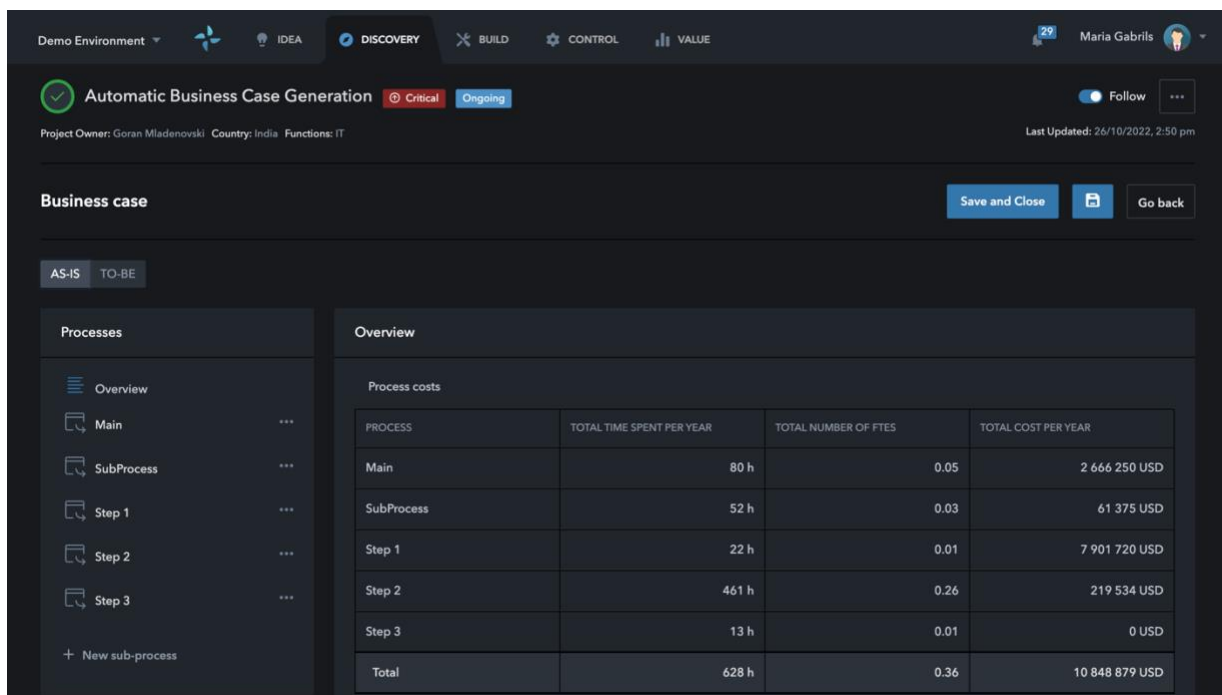
4. To-be Alternatives

4a. Add one or several Alternatives for automation

- Go to “TO-BE”
- Add one or several Alternatives. Add two or more alternatives to compare business case with different technologies. E.g., RPA vs OCR+RPA.

4b. Select sub processes

- Enter sub processes for each alternative
- E.g., RPA has one AS- IS sub process, RPA + OCR is divided into Part 1 and Part2



Business case

AS-IS TO-BE

Processes

- Overview
- Main
- SubProcess
- Step 1
- Step 2
- Step 3
- + New sub-process

Overview

Process costs

PROCESS	TOTAL TIME SPENT PER YEAR	TOTAL NUMBER OF FTEs	TOTAL COST PER YEAR
Main	80 h	0.05	2 666 250 USD
SubProcess	52 h	0.03	61 375 USD
Step 1	22 h	0.01	7 901 720 USD
Step 2	461 h	0.26	219 534 USD
Step 3	13 h	0.01	0 USD
Total	628 h	0.36	10 848 879 USD

5. Benefit and Tech costs

5a. Benefit estimation

- Enter AS-IS process
- Enter automation potential and other benefits

5b. Technology cost

- Select technology and vendor, add investment cost if needed
- Add technology runtime cost by selecting licenses connected to the specific cost (gathered from settings) If license cost is missing – go to settings page (slide 5) or set cost in “Other costs” instead.

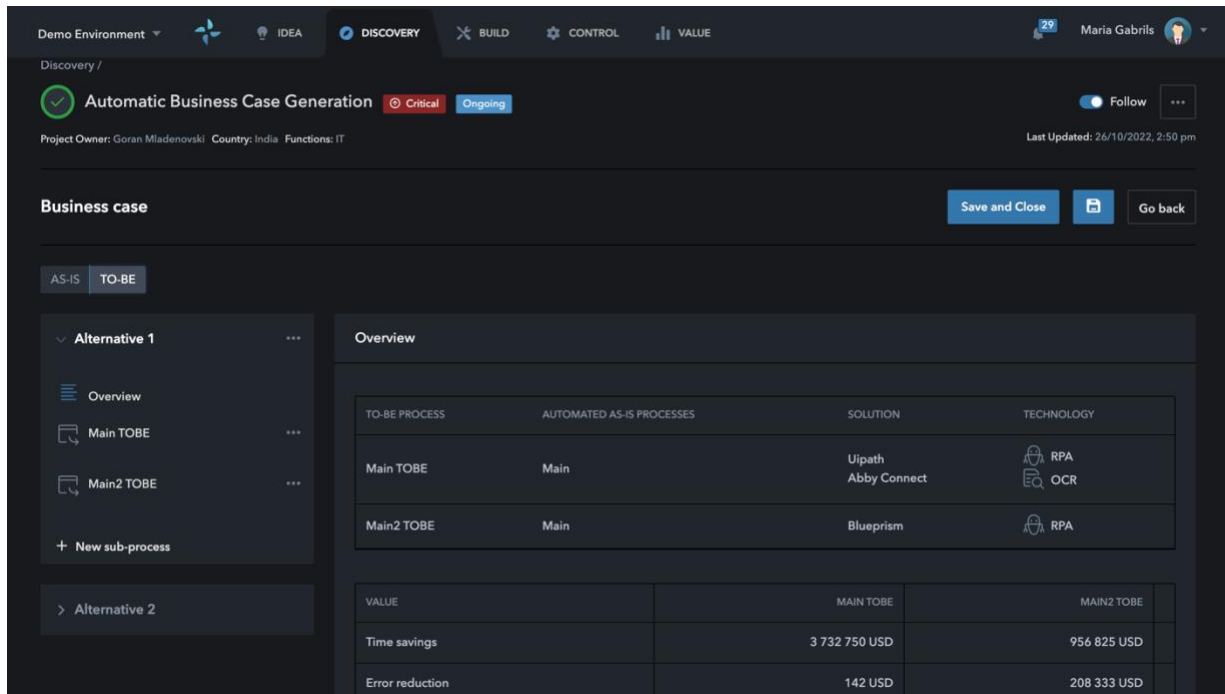
6. Resource costs

6a. Implementation resources

- Enter resources for the project
- Estimate effort
- Cost is gathered from settings pages. If resource cost is missing – go to settings page (slide 5) or set cost in “Other costs” instead.

6b. Maintenance resources

- Enter resources for maintenance
- Estimate effort
- Cost is gathered from settings pages. If resource cost is missing – go to settings page (slide 5) or set cost in “Other costs” instead.



The screenshot displays the Turbotic software interface for a project titled "Automatic Business Case Generation". The project is in a "Critical" and "Ongoing" state. The user is Maria Gabrils. The interface shows a "Business case" section with a "TO-BE" tab selected. Under "Alternative 1", there is an "Overview" section with a table of processes and their associated technologies.

TO-BE PROCESS	AUTOMATED AS-IS PROCESSES	SOLUTION	TECHNOLOGY
Main TOBE	Main	Uipath Abby Connect	RPA OCR
Main2 TOBE	Main	Blueprism	RPA

VALUE	MAIN TOBE	MAIN2 TOBE
Time savings	3 732 750 USD	956 825 USD
Error reduction	142 USD	208 333 USD

5.5 Quick Business case

The quick business case you provide a few data points and Turbotic provides a simple business case for you.

Instructions:

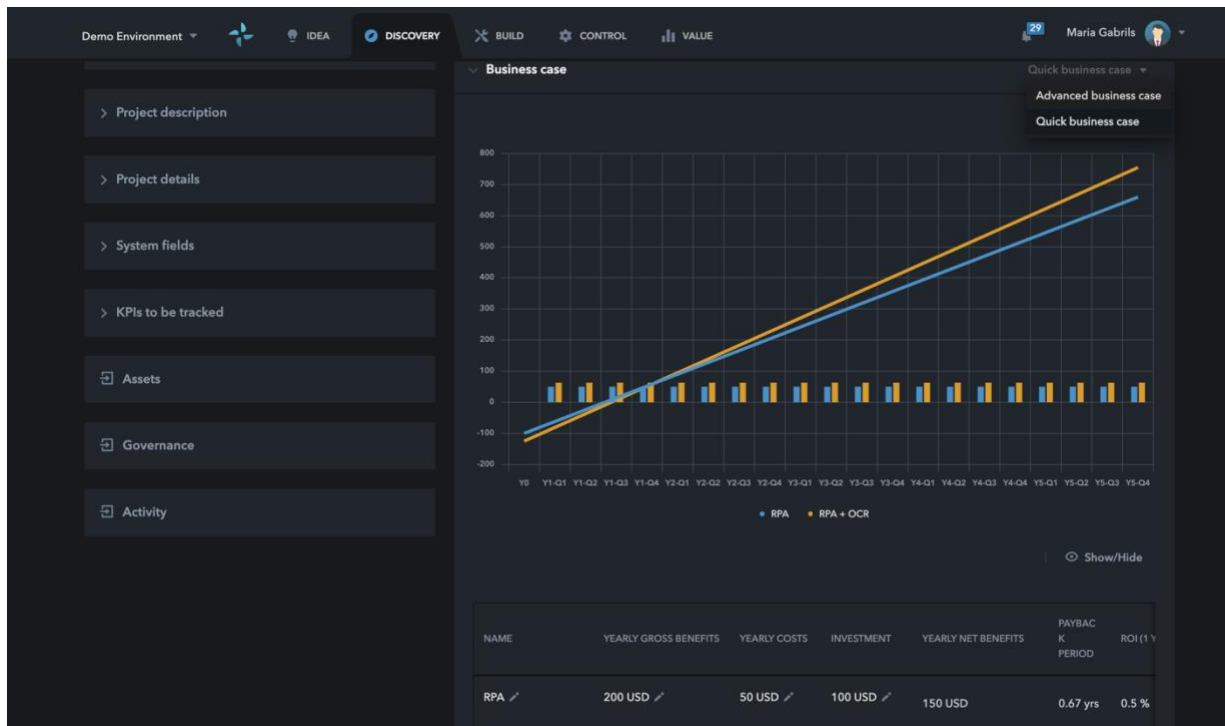
1. Create Business case

1a. Create automated business case

- Click on "New project"
- Enter details in popup
- Select version "Automated Business case"

1b. Select Quick Business case

- Go to "Business case"
- Select "Quick Business case"



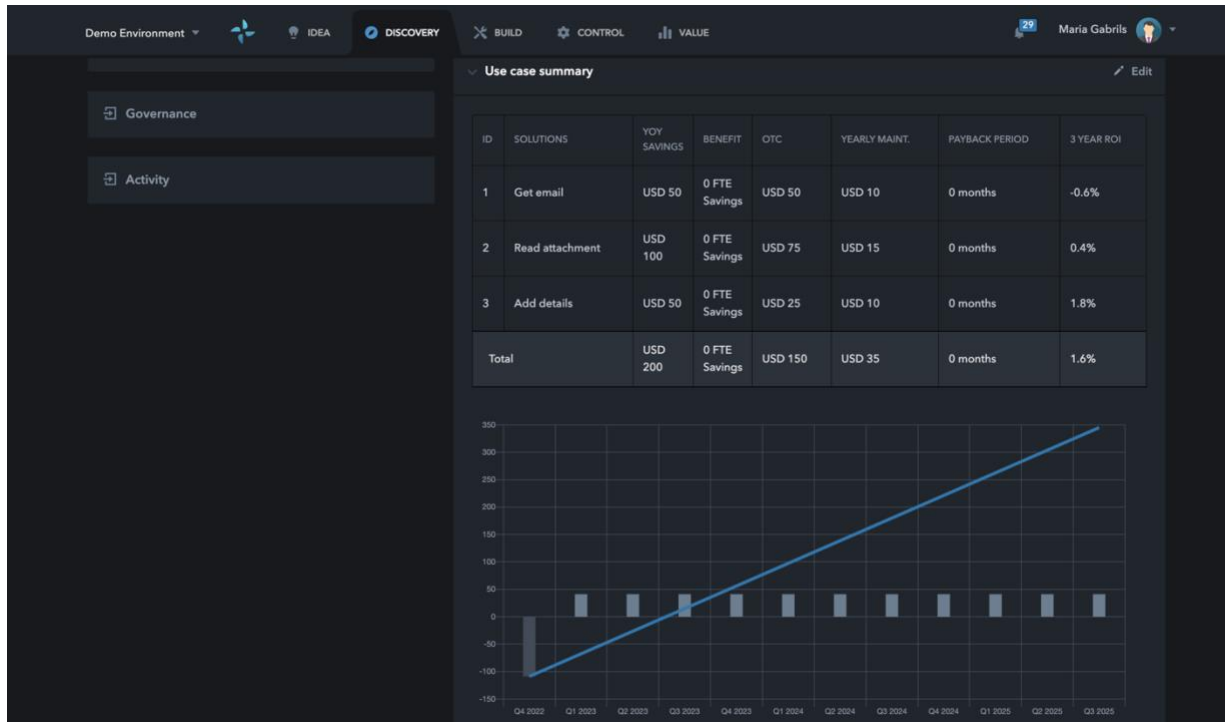
2. Build Business case

- Add alternative
- Enter yearly benefits
- Enter yearly costs
- Enter one time investment

5.6 Manual Business case

Enter already calculated business case data to the project.

1. Create Manual Business case
 - Click on "New project"
 - Enter details in popup
 - Select version "Manual Business case"



2. Build Business case
 - If the process can be divided into several part processes, create one sub processes per part.
 - Enter Business case data

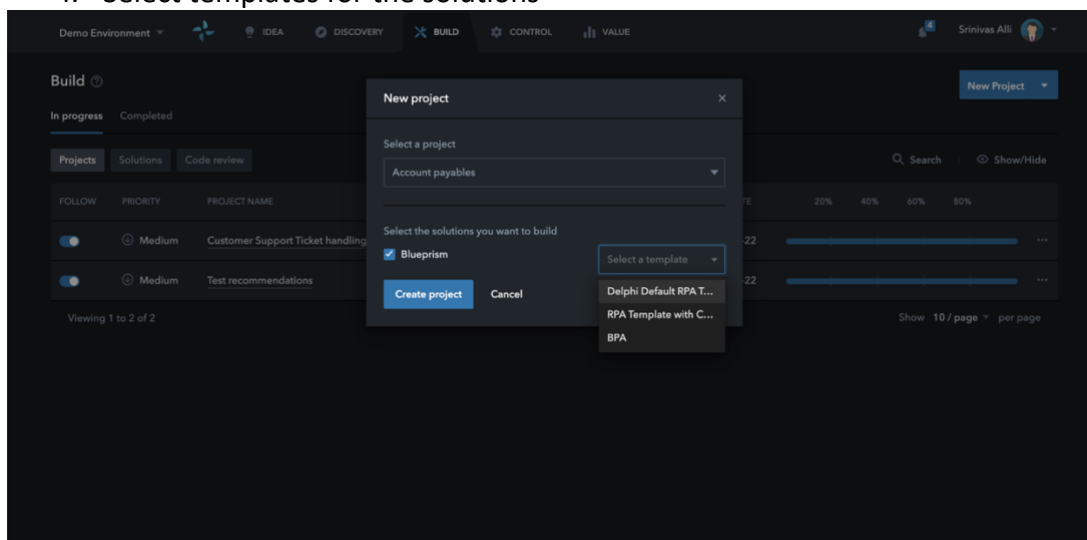
6 Build

Once you have an accepted discovery project and you want to move on to the next phase of implementing the solution, a build project can be created to support the implementation process. A Build project provides a set of phases that needs to be done to successfully implement automation solutions. The list is meant to act as a project management tool and is based on best practice methodology. However, the templates could be customized to the organization. See this slide on how you customize the phases.

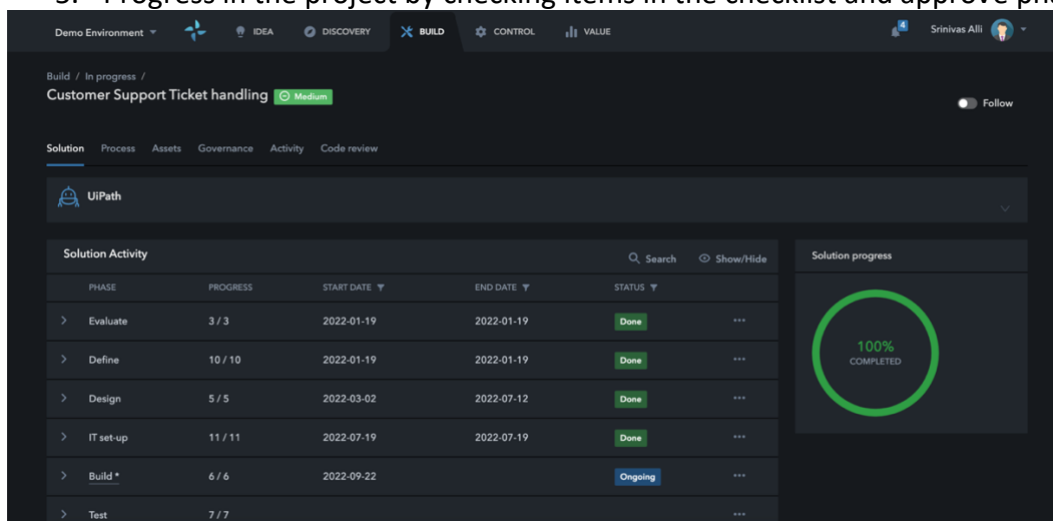
6.1 Create a build project

Instructions:

1. Click on New project
2. Select your project (from discovery)
3. Select solutions, one or several (from discovery)
4. Select templates for the solutions



5. Progress in the project by checking items in the checklist and approve phases.



7 Control

The control module is consumed by the Turbotiv users that are interested in operations and maintenance, here one can both *monitor* their solutions and projects as well as *orchestrate* the solutions.

Ensure that your robots, processes, and queues are tracked to enable monitoring and orchestrating. Link all solutions to a project, from previous modules in section or create new project directly in Control in section 7.1-7.5.

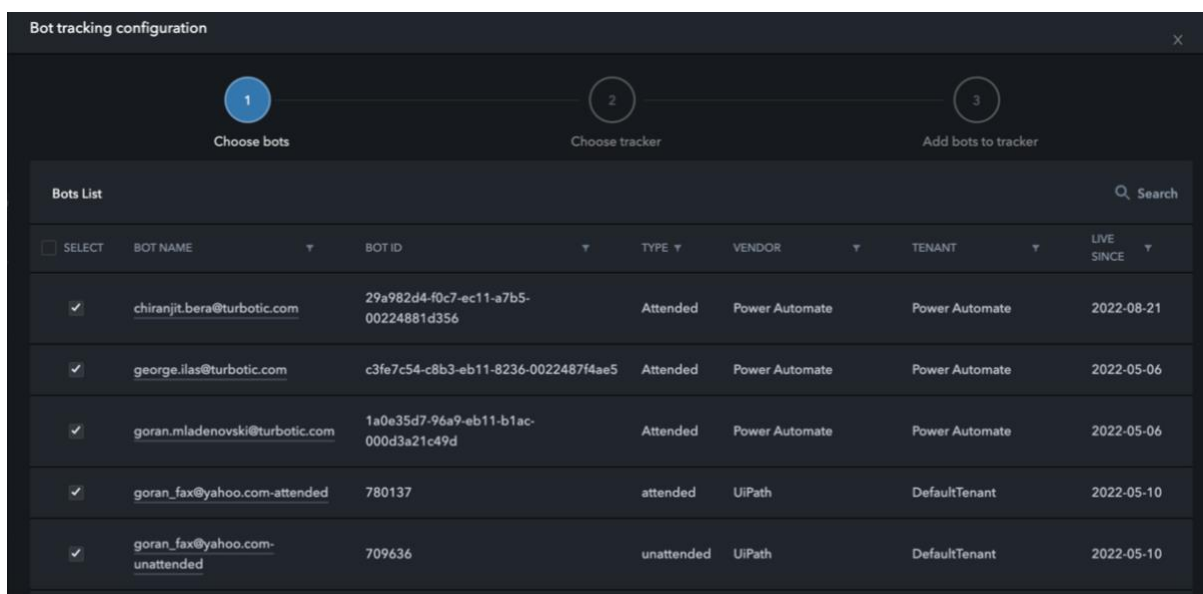
The monitoring capabilities in are described in section 7.6 and the orchestrating features are presented in section 7.7.

7.1 Track robots

Ensure that you have connected all desired tenants to Turbotiv, instructions on how to connect is described in Admin chapter for UiPath, Automation Anywhere, BluePrism, Service Now and Power automate. To get data from the robots, robots need to be tracked.

Instructions:

1. Go to Robots tab
2. Click “Track”, on the left side of robot table



SELECT	BOT NAME	BOT ID	TYPE	VENDOR	TENANT	LIVE SINCE
<input checked="" type="checkbox"/>	chiranjit.bera@turbotiv.com	29a982d4-f0c7-ec11-a7b5-00224881d356	Attended	Power Automate	Power Automate	2022-08-21
<input checked="" type="checkbox"/>	george.ilas@turbotiv.com	c3fe7c54-c8b3-eb11-8236-0022487f4ae5	Attended	Power Automate	Power Automate	2022-05-06
<input checked="" type="checkbox"/>	goran.mladenovski@turbotiv.com	1a0e35d7-96a9-eb11-b1ac-000d3a21c49d	Attended	Power Automate	Power Automate	2022-05-06
<input checked="" type="checkbox"/>	goran_fax@yahoo.com-attended	780137	attended	UiPath	DefaultTenant	2022-05-10
<input checked="" type="checkbox"/>	goran_fax@yahoo.com-unattended	709636	unattended	UiPath	DefaultTenant	2022-05-10

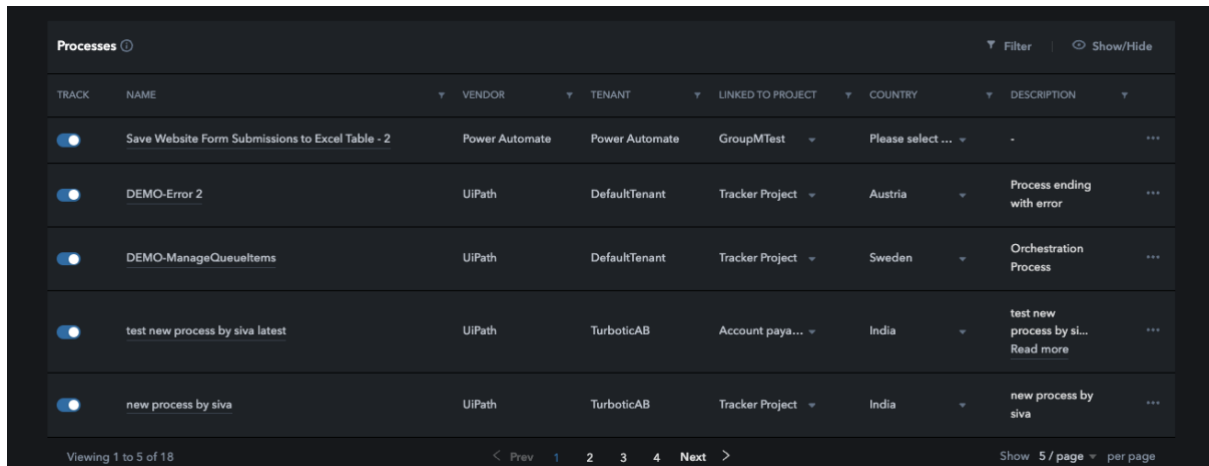
3. Select the robots that you want to track
4. Add them to a tracker
5. Go to next

7.2 Track processes

To display data regarding bot performance in value the solution needs to be tracked which is enable by clicking the button “track” in control module.

Instructions:

1. Enter the control module. Click “processes” in the upper left corner.
2. Scroll down past the diagrams until you reach the list of processes. To the left of the list of process is a column called “track” where you can activate the tracking function.



TRACK	NAME	VENDOR	TENANT	LINKED TO PROJECT	COUNTRY	DESCRIPTION
<input checked="" type="checkbox"/>	Save Website Form Submissions to Excel Table - 2	Power Automate	Power Automate	GroupMTest	Please select ...	-
<input checked="" type="checkbox"/>	DEMO-Error 2	UiPath	DefaultTenant	Tracker Project	Austria	Process ending with error
<input checked="" type="checkbox"/>	DEMO-ManageQueueItems	UiPath	DefaultTenant	Tracker Project	Sweden	Orchestration Process
<input checked="" type="checkbox"/>	test new process by siva latest	UiPath	TurboticAB	Account paya...	India	test new process by si... Read more
<input checked="" type="checkbox"/>	new process by siva	UiPath	TurboticAB	Tracker Project	India	new process by siva

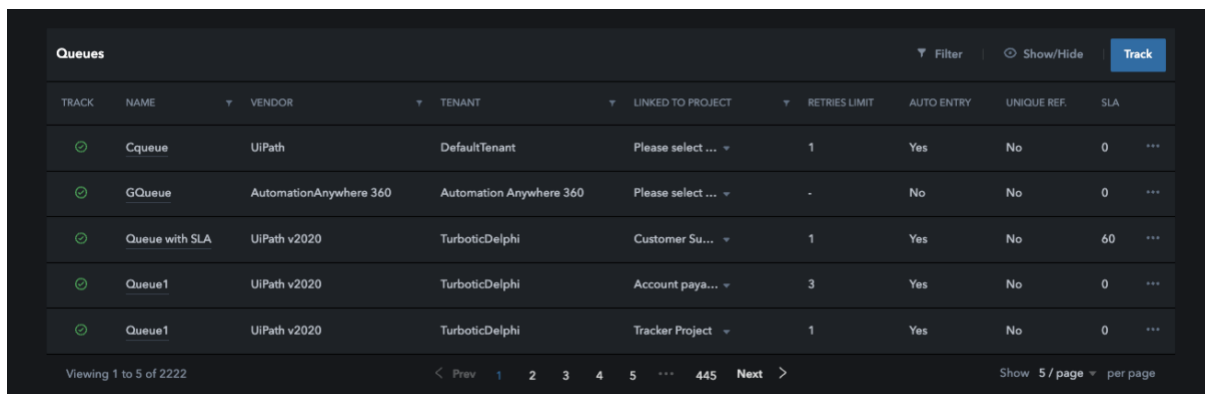
Viewing 1 to 5 of 18 < Prev 1 2 3 4 Next > Show 5 / page per page

7.3 Track queues

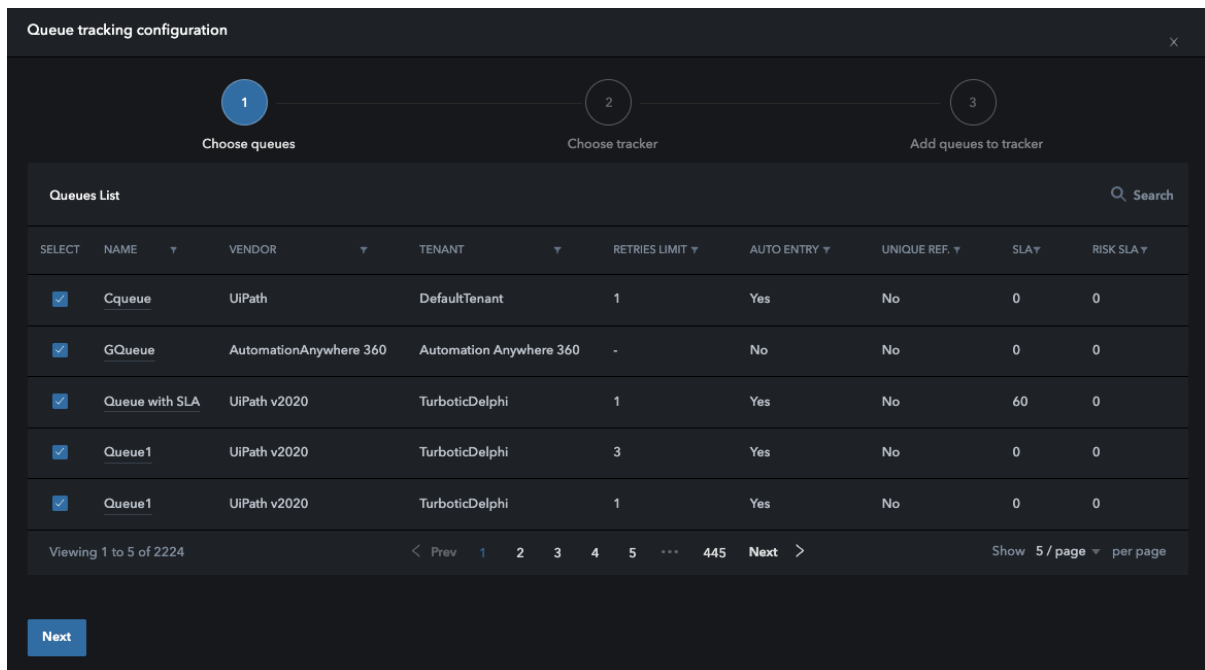
Ensure that you have connected all desired tenants to Turbotic, instructions on how to connect is described in Admin chapter for UiPath, Automation Anywhere, BluePrism, Service Now and Power automate. To get data from the robots, robots need to be tracked.

Instructions:

1. Go to Queue tab
2. On the button of the page there is a table with all queues.
3. Click “Track”, on the left side of robot table and follow instructions on the popup
In the 2nd step if queue trackers are missing, please contact your Turbotic contact.



TRACK	NAME	VENDOR	TENANT	LINKED TO PROJECT	RETRIES LIMIT	AUTO ENTRY	UNIQUE REF.	SLA
<input checked="" type="checkbox"/>	Cqueue	UiPath	DefaultTenant	Please select ...	1	Yes	No	0
<input checked="" type="checkbox"/>	GQueue	AutomationAnywhere 360	Automation Anywhere 360	Please select ...	-	No	No	0
<input checked="" type="checkbox"/>	Queue with SLA	UiPath v2020	TurboticDelphi	Customer Su...	1	Yes	No	60
<input checked="" type="checkbox"/>	Queue1	UiPath v2020	TurboticDelphi	Account paya...	3	Yes	No	0
<input checked="" type="checkbox"/>	Queue1	UiPath v2020	TurboticDelphi	Tracker Project	1	Yes	No	0



Queue tracking configuration

1 Choose queues

2 Choose tracker

3 Add queues to tracker

SELECT	NAME	VENDOR	TENANT	RETRIES LIMIT	AUTO ENTRY	UNIQUE REF.	SLA	RISK SLA
<input checked="" type="checkbox"/>	Cqueue	UiPath	DefaultTenant	1	Yes	No	0	0
<input checked="" type="checkbox"/>	GQueue	AutomationAnywhere 360	Automation Anywhere 360	-	No	No	0	0
<input checked="" type="checkbox"/>	Queue with SLA	UiPath v2020	TurboticDelphi	1	Yes	No	60	0
<input checked="" type="checkbox"/>	Queue1	UiPath v2020	TurboticDelphi	3	Yes	No	0	0
<input checked="" type="checkbox"/>	Queue1	UiPath v2020	TurboticDelphi	1	Yes	No	0	0

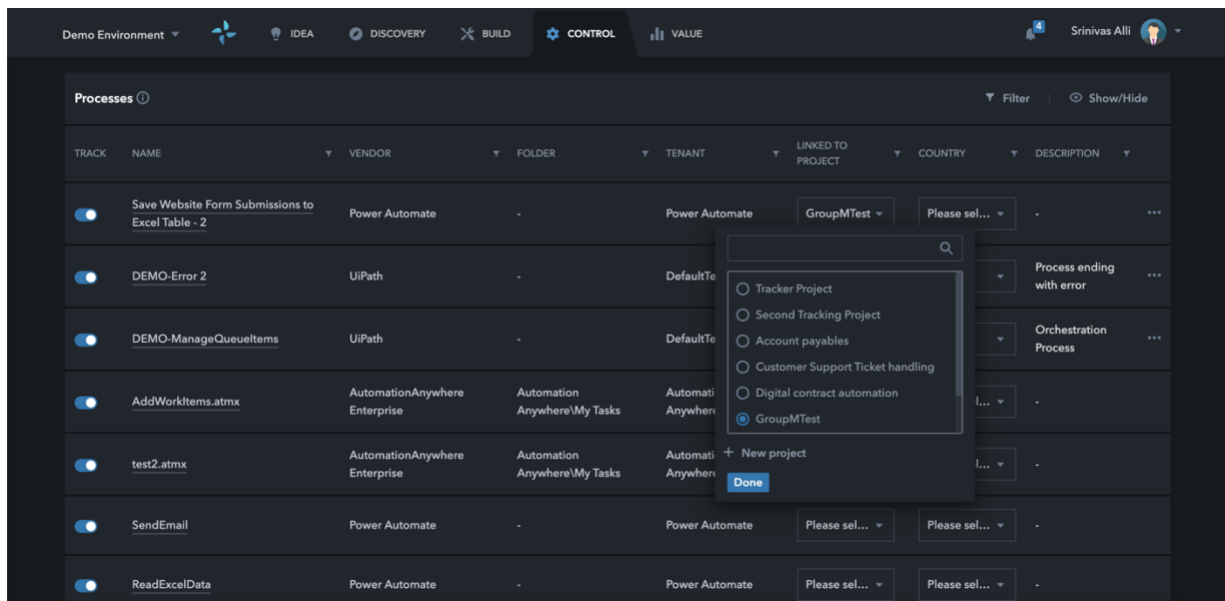
Next

7.4 Link solutions to project

In order to receive real-time data from your automated solutions compared to your business case in your discovery project – you need to link your solution to a project in Control module.

Instructions:

1. Enter the control module. Click “processes” or “queues” in the upper left corner.
2. Scroll down past the diagrams until you reach the table. To the right of each process there are three dots. Click on the dots and then click “link to project”
3. If you do not yet have a project to link to you can either first start a discovery project and enter the data. Or you can fast track by not connecting the solution to a project, but instead have it connected to a set of KPIs.



4. 6 KPIs are offered in Turbotic, 4 are tracked on data from jobs and 2 are tracked on data from queue items.

For processes:

- Net Savings (RPA Job Tracking)
- Saved Manual Time (RPA Job Tracking)
- Cost savings through error reduction
- Reduction of errors

For Queues:

- Net Savings (RPA Transaction Tracking)
- Saved Manual Time (RPA Transaction Tracking)

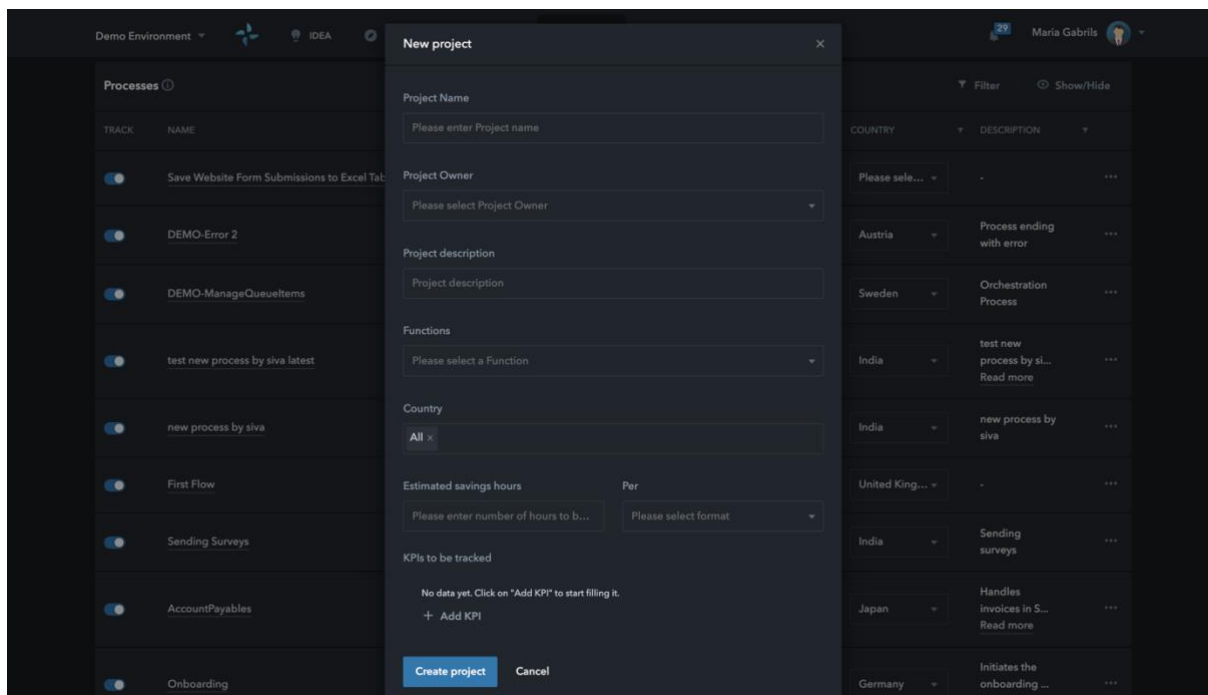
7.5 Fast track solutions

Fast track is a great option when you want to connect your already implemented solutions to Turbotic and see value in real-time straight away. Instead of having to fill in a full discovery project to connect your solution with KPI's, the fast-track features allows you to skip filling out most of the data and only asks you for the necessities in order for you to start seeing the real-time business value.

Instructions:

1. Enter the control module. Click “processes” or “queues” in the upper left corner.
2. Scroll down past the diagrams until you reach the table.
3. Instead of linking the project to an existing discovery project you can “fast track” by clicking create new project and only fill in the minimum required to start measuring value on your solution.
4. 6 KPIs are offered in Turbotic, 4 are tracked on data from jobs and 2 are tracked on data from queue items.

For processes:



Net Savings (RPA Job Tracking)

Saved Manual Time (RPA Job Tracking)

Cost savings through error reduction

Reduction of errors

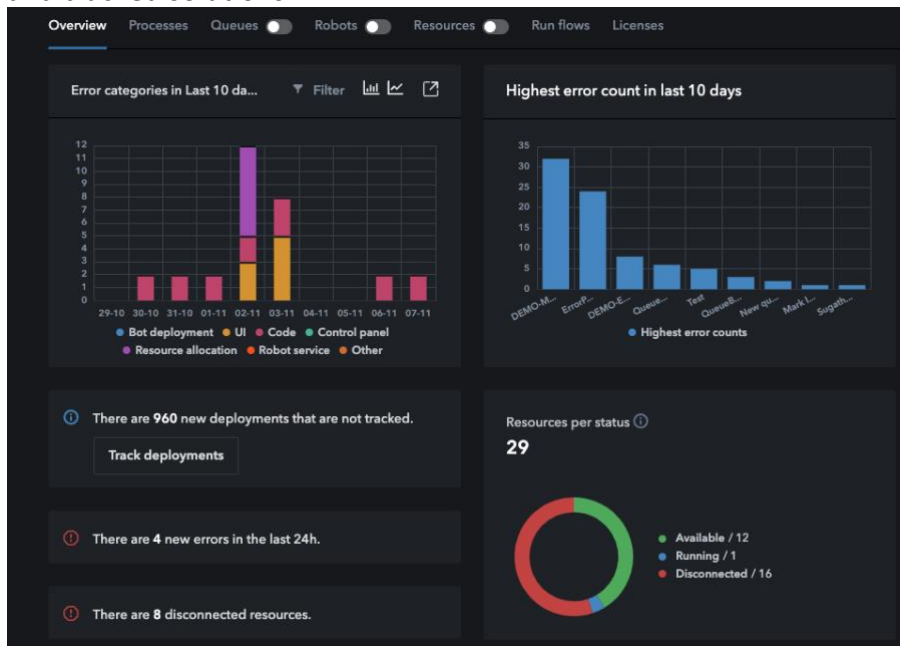
For Queues:

Net Savings (RPA Transaction Tracking)

Saved Manual Time (RPA Transaction Tracking)

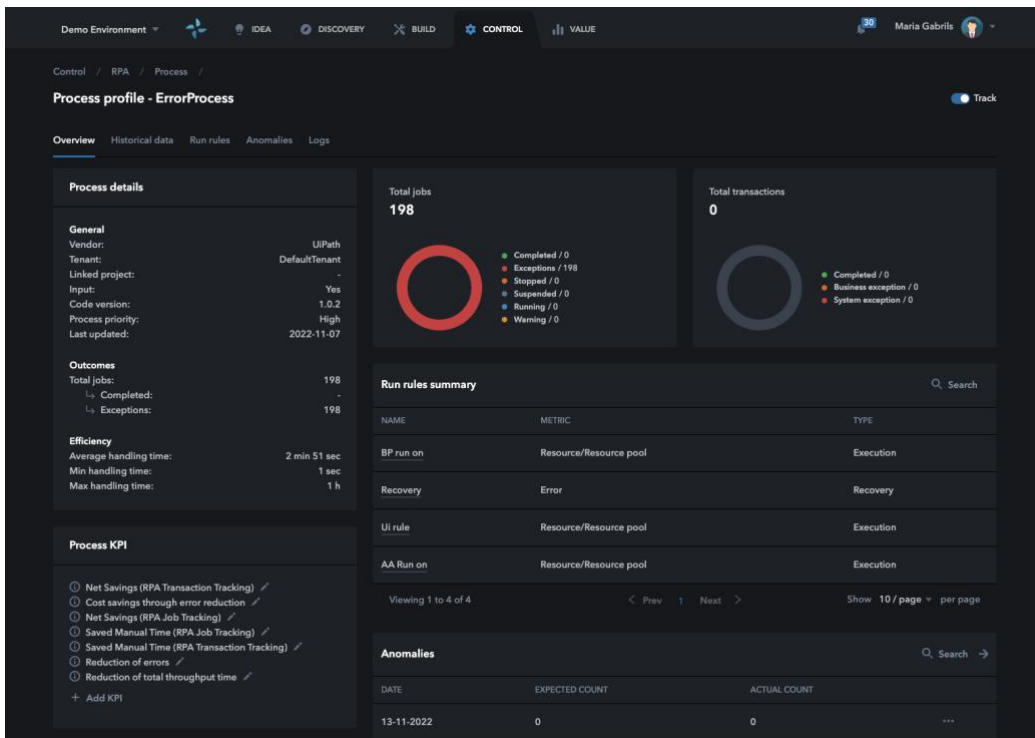
7.6 Monitoring

On the Overview page you will find all the relevant information and status on your environments and solutions. All data is aggregated from all the connected environments and tracked solutions.

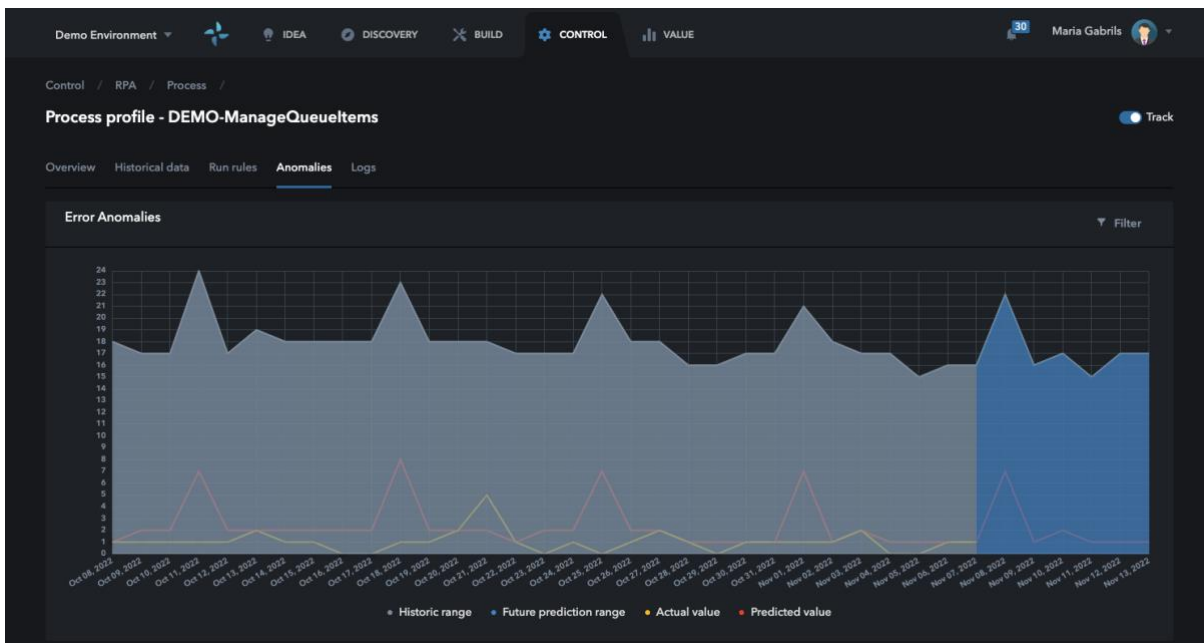


To monitor your solutions there are two pages where you will get a live snapshot on all processes and queues, the tabs Processes and Queues. The charts are error centric to track errors and overall performance, all charts are clickable for filtering alternatives and to get details. On the button on the pages there are tables with all processes and queues, track the solutions you want data from.

For every process and queue there is one Process profile page and Queue profile page, to get detailed data on one solution only.

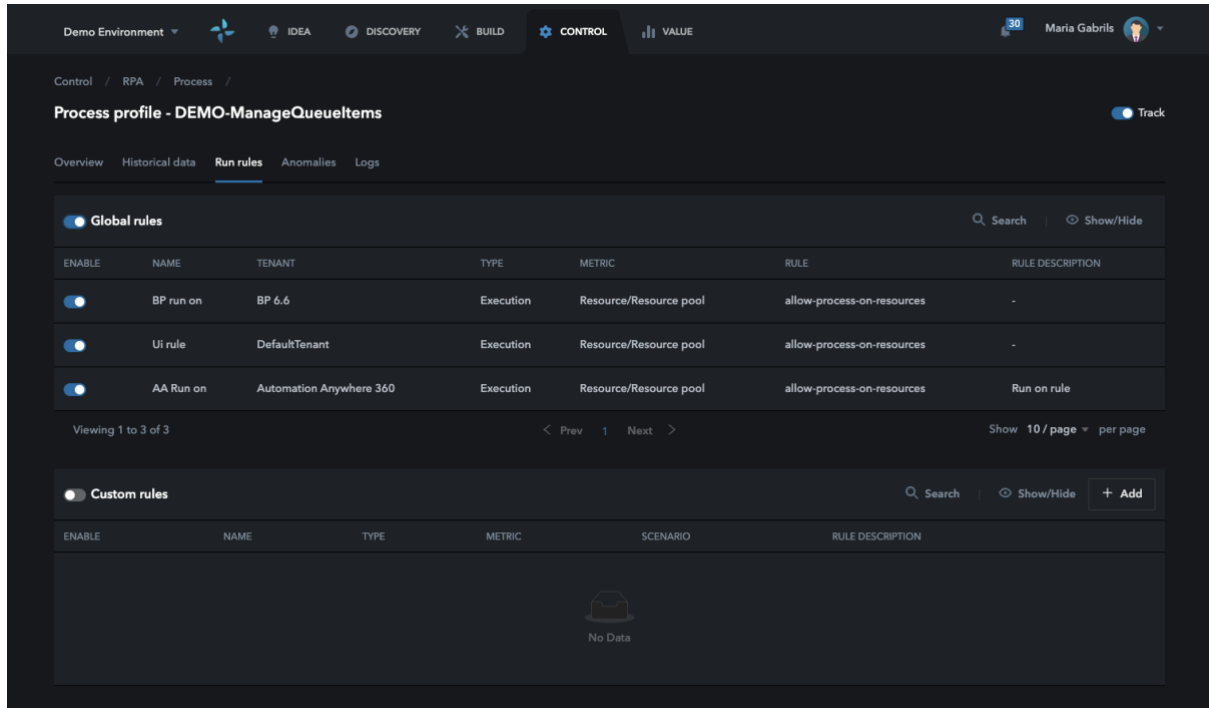


There are 3 tabs oriented around the errors, Historical data and Logs can be used for troubleshooting and the Anomalies chart is a ML based chart that presents the process normal behavior and predicted number of errors.



7.7 Process Run Rules

In the process profile page there is a tab to set “Run rules” for that individual process, these rules can also be set on a global level in [Settings](#) for all processes and on a trigger level in [Run flows](#).



The screenshot displays the 'Process profile - DEMO-ManageQueueItems' page in the Turbotic interface. The 'Run rules' tab is active, showing a table of global rules. The table has columns for 'ENABLE', 'NAME', 'TENANT', 'TYPE', 'METRIC', 'RULE', and 'RULE DESCRIPTION'. Three rules are listed, all with 'Execution' type and 'allow-process-on-resources' rule. Below the table, there is a 'Custom rules' section which is currently empty, showing a 'No Data' message.

ENABLE	NAME	TENANT	TYPE	METRIC	RULE	RULE DESCRIPTION
<input checked="" type="checkbox"/>	BP run on	BP 6.6	Execution	Resource/Resource pool	allow-process-on-resources	-
<input checked="" type="checkbox"/>	Ui rule	DefaultTenant	Execution	Resource/Resource pool	allow-process-on-resources	-
<input checked="" type="checkbox"/>	AA Run on	Automation Anywhere 360	Execution	Resource/Resource pool	allow-process-on-resources	Run on rule

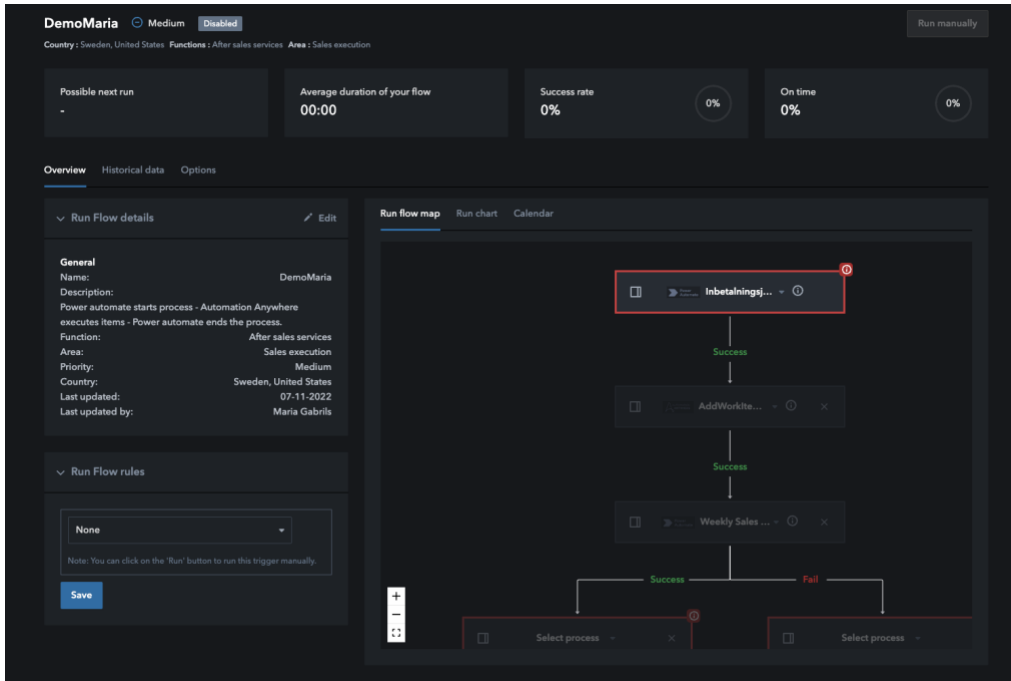
7.8 Orchestration

On the Run flow tab, you will find the orchestrating capabilities in Turbotic. Here you can monitor your schedules from the connected environment or create your own triggers directly in Turbotic.

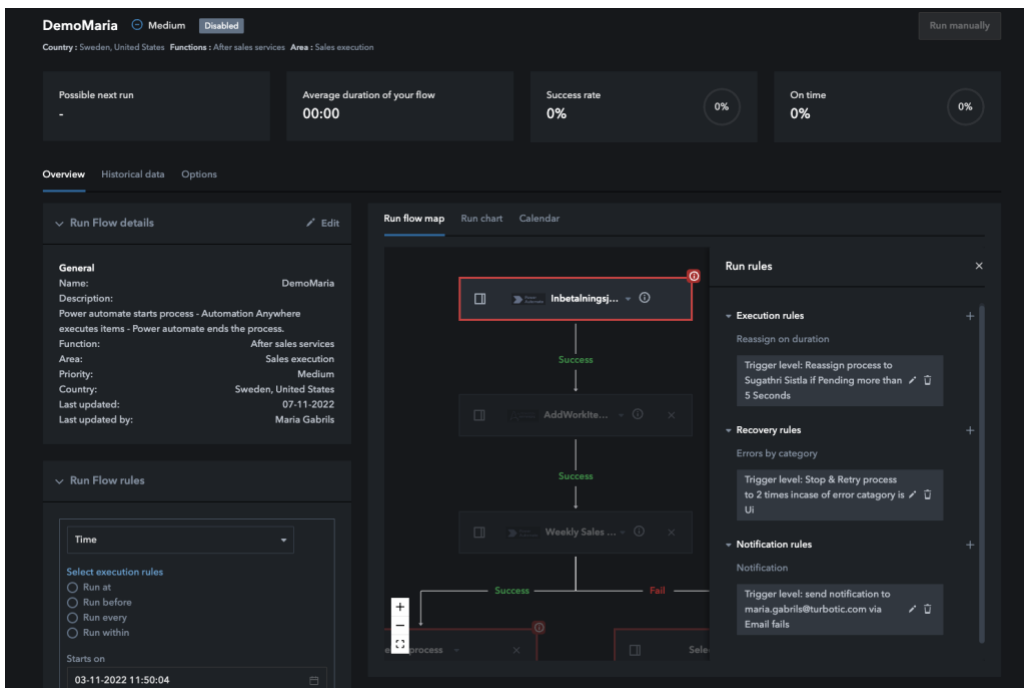


To create a new Run Flow, click on “New run flow” and start setting up a static or dynamic trigger from Turbotic. Select one or several processes into the Run flow, if needed add conditions for failed and successful process.

There are several types of triggers: time, event, API and None please select one based on your needs. If the trigger has errors or conflicts the affected process gets highlighted in red and has an error message.



Add Run Rules by clicking on one process on the icon on the left side, these rules can also be set on a global level in [Settings](#) for all processes or for specific process in [Process profile page](#).



Enable the flow by clicking on “Options” and then “Enable”.
To edit the run flow, disable the run flow first to be able to edit the trigger, processes and run rules.

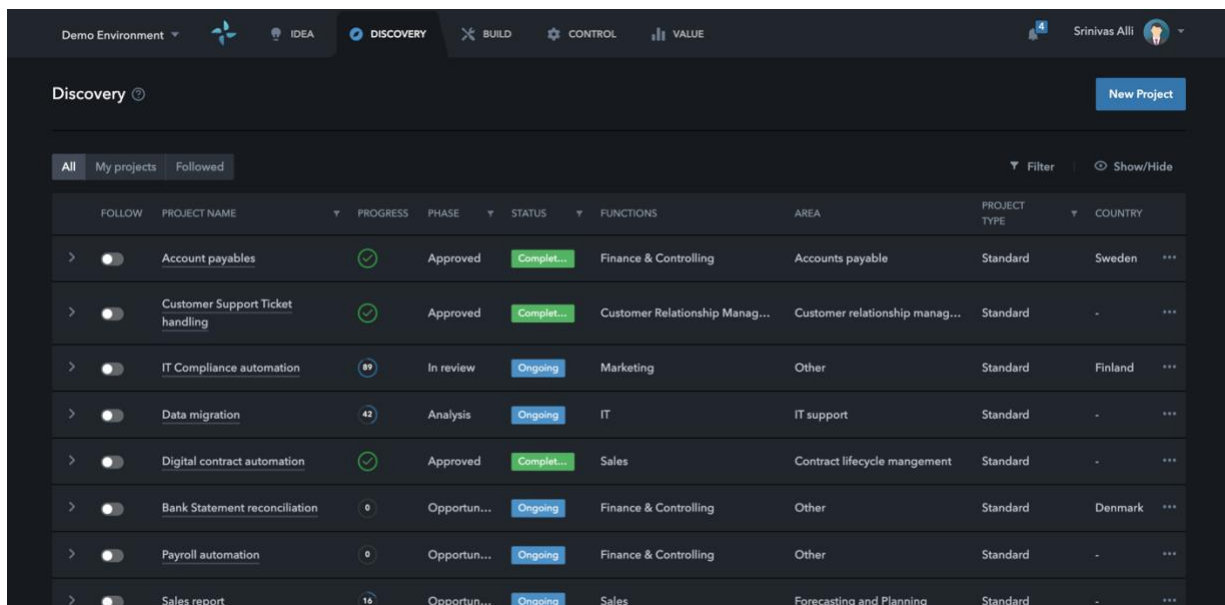
8 General

8.1 Follow projects that you want updates from

Up in the right corner next to your name you find an icon that looks like a bell. This is where you will receive notifications in Turbotic. You can choose to get notifications from projects by following them.

Instructions:

1. Enter the discovery module
2. In the column left to all the projects in the list you will find a button where you can follow or unfollow a project



The screenshot shows the 'Discovery' module in Turbotic. The top navigation bar includes 'Demo Environment', 'IDEA', 'DISCOVERY', 'BUILD', 'CONTROL', and 'VALUE'. The user's name 'Srinivas Allu' is visible in the top right corner. Below the navigation, the 'Discovery' section has a 'New Project' button and tabs for 'All', 'My projects', and 'Followed'. A table lists various projects with columns for 'FOLLOW', 'PROJECT NAME', 'PROGRESS', 'PHASE', 'STATUS', 'FUNCTIONS', 'AREA', 'PROJECT TYPE', and 'COUNTRY'. Each project row has a toggle switch in the 'FOLLOW' column to manage notifications.

FOLLOW	PROJECT NAME	PROGRESS	PHASE	STATUS	FUNCTIONS	AREA	PROJECT TYPE	COUNTRY
<input type="checkbox"/>	Account payables	100%	Approved	Completed	Finance & Controlling	Accounts payable	Standard	Sweden
<input type="checkbox"/>	Customer Support Ticket handling	100%	Approved	Completed	Customer Relationship Manag...	Customer relationship manag...	Standard	-
<input type="checkbox"/>	IT Compliance automation	89%	In review	Ongoing	Marketing	Other	Standard	Finland
<input type="checkbox"/>	Data migration	42%	Analysis	Ongoing	IT	IT support	Standard	-
<input type="checkbox"/>	Digital contract automation	100%	Approved	Completed	Sales	Contract lifecycle mangement	Standard	-
<input type="checkbox"/>	Bank Statement reconciliation	0%	Opportun...	Ongoing	Finance & Controlling	Other	Standard	Denmark
<input type="checkbox"/>	Payroll automation	0%	Opportun...	Ongoing	Finance & Controlling	Other	Standard	-
<input type="checkbox"/>	Sales report	16%	Opportun...	Ongoing	Sales	Forecasting and Planning	Standard	-