AUTOMATE GETTING STARTED TRAINING OVERVIEW

The Automate Getting Started training program helps customers quickly apply their knowledge to create and employ business-critical automation tasks.

The HelpSystems suite of Automate products provides a single source, end-to-end robotic process automation solution that supports quick deployments and fast return on investment. Customers can now take advantage of our Automate Getting Started training program to accelerate the deployment of their robotic process automation (RPA) strategy. The training program is comprised of a series of remote, instructor led sessions, focused on:

- Familiarization of basic Automate product concepts, capabilities and features
- Selection of a manual business process to automate including identification of the individual process steps to achieve the desired outcome
- Design of the task steps needed to produce the same outcome as the manual sequence of events

Through the Getting Started training program, customers will walk away with a working knowledge of the Automate product and a completed RPA workflow that can serve as a building block for future automation projects. The training program will help customers leverage the efficiencies provided by Automate products as quickly as possible and make it even faster for customers to realize a return on investment.

DESCRIPTION OF SERVICES

- Installation and configuration of Automate software component(s), if required
- One-on-one instruction on Automate properties and user administration including security settings
- Conceptual overview of the robotic automation process including tasks, workflows, agent deployments, and associated triggers
- Guidance on task and workflow construction to achieve desired automation outcome
- Overview of actions available for construction of RPA workflows
- Design and construction of tasks and workflows
- Direction on troubleshooting techniques and practices

INTENDED AUDIENCE

- New Automate product customer
  - DIY environment
  - Desire a working knowledge of Automate
- Existing customer needing Automate training for new users

TRAINING ENVIRONMENT PREREQUISITES

- Customer has purchased and received the Automate software
- All networking components are in place for proper communications between required systems
- Customer’s pre-specified database software is installed and configured for access, if needed, by the Automate Enterprise Server
- Availability of a Customer Subject Matter Expert for process to be automated
- Availability of Customer Windows System Administrator

About HelpSystems

Organizations around the world rely on HelpSystems to make IT lives easier and keep business running smoothly. Our software and services monitor and automate processes, encrypt and secure data, and provide easy access to the information people need.