WHITEPAPER

A GUIDE TO PROCESS DISCOVERY FOR ACCELERATED DIGITAL TRANSFORMATION

How to Capture Your Current State Processes with Precision and Ease
Introduction

To successfully execute against your digital transformation strategy, you need transparency and detailed understanding around how your business operates today. This includes not only what your critical processes are and the steps within them, but the people and systems that interact with those processes, and the business rules or regulations that ensure their compliance. Having this holistic understanding enables you to pinpoint exactly what’s working, what’s not, and where the greatest opportunities for improvement lie within your business.

However, a significant amount of confusion surrounds the technologies that enable the discovery of business processes and the people and systems that interact with them.

There are machine-based discovery solutions, such as process mining and task mining tools, as well as human-driven solutions, like task capture tools. They all have their merits and challenges, but selecting the tool that is right for your organization is critical to access the vital process knowledge necessary to drive a successful automation strategy that powers your digital transformation.

To help you make an informed decision, this eBook outlines the differences between both and examines why task capture solutions may be the best option for your organization, regardless of the desired outputs to drive your digital transformation’s success.

Machine-Based vs Human-Driven Process Discovery Tools: What’s the Difference?

Machine-Based Process Discovery Tools

Machine-based process discovery tools can be divided into two categories: process mining tools or task mining tools. In both cases, these tools use artificial intelligence (AI) to discover processes and tasks.

Human-Driven Process Discovery Tools

Human-driven process discovery tools can be boiled down to just one category: task capture solutions.

Task capture solutions and task mining tools are similar in the sense that they both discover and document tasks. However, human-driven task capture solutions don’t rely on machine-based technology, which drops agents on a computer and produces an overwhelming amount of data. Instead, an employee triggers the task capture solution to manually record a task as they execute it, allowing each step of that task to be captured, right down to the essential lower-level details.
Process Mining, Task Mining, Task Capture: A Breakdown of the Different Process Discovery Tool Categories

Just like RPA (Robotic Process Automation), process discovery is also becoming a buzzword with its own set of differentiating terms. Therefore, it’s important to distinguish between these terms while also illustrating how they’re inter-connected.

Process Discovery is the technique of identifying, documenting, and analyzing all your business processes to clarify how your business runs today and how it can be improved upon in the future.

Process Discovery is essentially the umbrella term that each subsequent tool or technology is categorized under. Even though process mining, task mining, and task capture perform different functions with different technologies driving them, they are all considered process discovery tools.

What is Process Mining?

Process mining is a technology that investigates the mountains of data in enterprise event logs. It also discovers and presents end-to-end processes the organization is performing to complete work. Event logs are banks of data that store information like logins to software in the enterprise tech stack, interactions in that software, logoffs, etc.

The benefit of process mining is that after the software has successfully mined a process (along with the process’ variants), it presents suggestions on how the process can be improved and optimized. The most common use case for adopting process mining technology is to improve processes with the goal of automating them for all the benefits and returns that come with automation, like improved customer and employee experiences.
What is Task Mining?

Task mining tools are similar to process mining solutions because they also use AI; however, they don’t mine through event logs or uncover processes. Instead, task mining tools discover tasks and sit at the desktop level, recording the interactions a user performs (like mouse clicks and keyboard inputs) while taking screenshots for every interaction.

They use artificial intelligence like computer vision to infer what the user is doing and document that task. Common use cases for task mining include improving task execution by removing waste, identifying automation candidates for RPA, re-training, re-engineering, and outsourcing.

What is Task Capture?

Task capture solutions are similar to task mining tools because they both discover and document tasks.

Where they differ is that human-driven task capture solutions don’t rely on machine-based technology that drops agents on an employee’s computer to log every single mouse click and key stroke they perform within a day, which produces an overwhelming amount of data and much of which is messy, or not even relevant to any processes that may be targeted for improvement.

Instead, an employee must manually trigger task capture tools when they want to record a process. The task capture solution will still record every mouse-click, hotkey, and keyboard interaction, taking screenshots at every step, and map that into a process editor where it can be further modified and optimized. The difference is that these tools collect this information in a targeted and contextualized way, producing structured documentation of a process flow instead of mass amounts of data that must later be sifted and organized.

The value that human-driven task capture tools deliver is that they collect the details of each task that is needed to drive the key outputs central to any digital transformation: automation, re-engineering, outsourcing, or simply improved task executions that enhance quality and reduces costs.

Organizations are quickly realizing that their subject matter experts (SME) and process owners already know how their business works. They possess the necessary process knowledge and can easily define and model them. What they need most are the low-level details of each sub-task to that process, collected in a way that isn’t intrusive and doesn’t produce too much data, facilitating the outputs that fuel digital transformations.
Which is Best for You? Process Mining vs Task Mining vs Task Capture

While both process and task mining solutions are very capable of collecting a lot of data, that’s also their biggest weakness and consequential pain-point: they collect too much data and introduce too much noise. They cast a wide net and identify variations for how each process or task is executed, followed by using machine intelligence to merge that all back together. Unfortunately, someone must then manually scrub that mountain of data to find an accurate and precise picture of what’s actually happening.

Without the proper resources—like data scientists who might make sense of all that data or a solid support and implementation structure—process and task mining create a whole new set of obstacles instead of addressing the challenges they were brought in to solve. Additionally, in the case of task mining tools, several privacy concerns are introduced as the software essentially watches and records what users are doing on their workstations. Cost is another sticking point with both process and task mining tools, with the simple truth being that they’re both very expensive.

For those reasons, many organizations are turning to more accessible and functional human-driven task capture tools that deliver better results.
The Benefits of Task Capture

There are several benefits of task capture that make it the better option when choosing between Process Discovery tools, including:

**Automation**

**Discover Automation Opportunities** – Task capture delivers the insight needed for optimal RPA candidate identification and prioritization like process velocity and utilization. It also provides the steps of the task, giving you a ready-made canvas for process optimization and automation design.

**Increased Efficiency**

**Process Improvement** – Task capture delivers the data needed for business process experts to easily identify gaps, waste, and all other areas where task execution can be improved regardless of whether the objective is automation or continuous process excellence.

**Decreased Process Variance** – Since task capture records user interactions, it allows organizations to better understand the different variants that may exist when that task is performed, providing a platform for standardization to reinforce quality and efficiency.

**Enhanced Productivity**

**Improved Employee Experience** – Task capture uncovers the repetitive, mundane tasks executed by employees and provides the opportunity to automate those rule-based tasks. Not only does this drive efficiency gains, but it also allows those employees to focus on more engaging, business-critical activities.

**Improved Compliance**

**Risk Analysis** – Considering that task capture records and collects user interactions, tasks that are impacted by controls, policies, and regulations can be scrutinized to ensure that task execution is compliant and eventually automated for even greater assurances of compliance.
Blueprint Task Capture

Blueprint Task Capture is the latest addition to the award-winning Blueprint Enterprise Automation Suite. It’s a human-driven task capture solution that helps you accelerate business process documentation and deep-dive into automation ideas, enabling you to quickly capture, prioritize, and enhance your business processes so that you can accelerate your automation pipeline.

It bridges the gap between SMEs and your RPA CoE, enabling the countless Citizen Designers you already have working within your organization to accelerate your automation pipeline. Your process owners and SMEs provide the high-level process to be captured, and then your SMEs can use the light-weight, non-invasive Blueprint Task Capture tool to collect all the low-level details that will accelerate any output you have in mind.

When your Citizen Designers capture tasks with Blueprint Task Capture – and there’s no limit to the number of tasks they can capture, making it one of the most cost-effective solutions available – our solution will even tell you how much of that task is immediately compatible with and can be automated in any RPA platform you use, due to Blueprint’s bi-directional integrations with the leading providers.
How Does Blueprint Task Capture Work?

Blueprint Task Capture accelerates digital transformations and RPA pipelines by following these 5 quick and easy steps:

1. **CREATE A DIAGRAM**
   Once you identify a potential automation candidate, start by creating a high-level diagram for your process as a Digital Blueprint. Defining the process flow context up front allows you to control the outcome right from the beginning, and you’ll spend less time refactoring the process map after it’s been recorded.

2. **CAPTURE DETAILS**
   Then, use our browser-based capture tool to automatically capture and populate contextualized process workflows in high detail, including a sequenced flow of all actions, all Common Object Model (COM) details (like apps, actions and parameters), and screenshots of your every click, hotkey, and keyboard input.

3. **REVIEW & PRIORITIZE**
   Base your processes for automation by value and ease of execution. Blueprint can even tell you the percentage of a process that is automatable or mappable into your RPA platform of choice, helping you identify the processes that are going to drive value the fastest.

4. **OPTIMIZE & CONNECT**
   From there, your Citizen Designers can easily edit and further optimize the process, overlaying related systems, dependencies, and regulations – as well as comments and descriptions – so you don’t miss any critical details.

5. **EXPORT TO RPA**
   Your auto-populated and optimized process maps will be ready to export into your RPA tool of choice for your RPA developer teams to get a head start to development, with the rich and precise context that leads to higher-quality bots.
The Benefits of Using Blueprint Task Capture

Blueprint Task Capture delivers a number of game-changing benefits that set it apart from any other task capture solution available on the market:

**Empower Citizen Designers** – Process owners and SMEs define the high-level processes, capture the low-level details with Blueprint Task Capture, and generate Digital Blueprints to give your CoE the rich, precise guidance they need for higher quality, accelerated bot development.

**Eliminate Manual Work** – Quickly capture structured data with high signal-to-noise ratio in a contextual way, while automatically recording the specific details and screenshots for each step. We completely remove the manual analysis and heavy-lifting needed from other machine-based task capture tools that cast too wide of a net, merge all variations together, and provide outputs that are nearly impossible to make sense of.

**Data-Driven Approach** – When you capture a task in Blueprint, we show you what percentage of that task that is compatible with and can be quickly automated in the RPA platform you use, to boost RPA prioritization and pipeline velocity.

**Generate the necessary RPA documentation** – Based on the collected information, quickly generate ready-made Digital Blueprints and automation prototypes to accelerate development.

**End-to-End Management** – Automatically sync your Digital Blueprints with your RPA tool, creating a digital design artifact in Blueprint that stays synchronized with your bot in production to enable proactive change management and maximize uptime.

**Flexibility** – Blueprint Task Capture works across multiple RPA platforms and is a perfect fit for either top-down or bottom-up automation strategies, sliding in seamlessly into any RPA governance and management model.

**Simple & Secure** – Blueprint is simple to deploy, non-invasive, and secure with built-in privacy mechanisms. Controls to prioritize data security and privacy include the intuitive and easy-to-use capture mode that avoids capturing sensitive data.
About Blueprint

Blueprint is a leading provider of digital process discovery, design and management solutions to Fortune 1000 organizations. Integrating directly with your RPA tool, Blueprint fast-tracks your digital transformation by providing a better way to capture, design, govern, and manage high-quality digital workers - or migrate entire bot portfolios. This eliminates many of the challenges of scaling RPA enterprise-wide, allowing you to execute against your vision at velocity and drive greater ROI. Today, global leaders from every industry use Blueprint to fast-track their digital transformation so they can deliver on short-term wins and long-term strategy. For more information, visit www.blueprintsys.com